Kofax Copitrak Edge
Configuration Guide

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KOFAX

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Preface

This guide includes instructions for configuring and using Kofax Copitrak Edge.

Related documentation

Product documentation for Kofax Copitrak Edge 2.6.0 is available at the following location:

https://docshield.kofax.com/Portal/Products/CopitrakEdge/2.6.0-6ymgczadm8/CopitrakEdge.htm

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:

1. Go to the Kofax website home page and select **Support**.

2. When the Support page appears, select **Customer Support** > **Knowledge Base**.

> ⓘ 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.

From the Knowledge Base home page, you can:

- Access the Kofax Community (for all customers).

   Click the **Community** link at the top of the page.

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

   Click the **Support** link at the top of the page. When the Customer & Partner Portals Overview appears, click **Log in to the Customer Portal**.

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

  Click the **Support** link at the top of the page. When the Customer & Partner Portals Overview appears, click **Log in to the Partner Portal**.

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

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

Chapter 1

Overview

Kofax Copitrak Edge™ is an external hardware terminal that uses Windows 10 as its operating system to deliver performance comparable to modern desktop computers. This performance enhances the speed, functionality, and quality of scan delivery with its unified user interface across various makes and models of multi-function printers (MFPs). The Edge terminal requires the Kofax Copitrak Edge software, sold separately, in order to perform copy and scan capture, as well as print release functionality.

This document provides the instructions to configure the Edge terminal for basic processing of transactions through the Kofax Copitrak System Software (CSS). The guide outlines the server-side options necessary to track copy, print, and scan operations.

> ❶ Information about configuring the Edge terminal on tablets is not covered in this guide.

Software features

The Copitrak Edge software offers robust options for document workflows, including:

- Secure Document Release (SDR)
- Enhanced scan workflows
- Device access control
- Enhanced security and encrypted protocols through Windows 10 security infrastructure
- Pull scanning
- Intuitive workflows
- Unified single user interface across multiple makes and models of MFPs
- Data policy compliance and network security for IT departments
- Watch folders supported locally or on a network
- TWAIN scanning available for different makes and models of MFPs (Kofax Support maintains a list of currently supported drivers.)

Upgrade Copitrak Edge software

If the Edge terminal is being used when you start upgrading, any users currently signed in to the device are automatically signed out. It is best to perform this operation when you know that device use is minimal.

1. Ensure that Internet Information Services (IIS) is correctly set up and running.

   For setup instructions, consult your Windows 10 documentation or refer to the instructions on the Microsoft website.

2. Go to the Partner Portal and download the upgrade package.

3. Extract the files included in the package zip file into the Copitrak Edge installation folder of the server associated with the Edge terminal.

The terminal detects an upload package by communicating with the CSS server, and implements the upgrade automatically.

Supported TWAIN drivers for pull scanning

The list of supported TWAIN drivers is continually changing. Contact your vendor for additional details.

Copitrak Edge configuration

This section covers the basic configuration of a Kofax Copitrak Edge terminal for copy tracking using the default terminal group "REGULAR" and default user group "REGULAR".

This setup prepares a terminal to communicate with the CSS server.

Prerequisites

You must have administrative access (including valid Windows network credentials with assigned administrative rights) to the MFP, the Edge terminal, and to the network computer hosting the CSS components to install and configure Copitrak Edge. Administrative access to the MFP is required to ensure the copy control interface is correctly secured. Consult your copier technician for information if you are unsure how to do this.

> ⓘ Because both the server and the Edge terminal run their own independent installations of the Windows operating system, there are two administrator logins to consider:
> * The administrator credentials for the server which hosts the CSS
> * The administrator credentials for the Edge terminal

Please ensure you are using the correct administrator credentials for the environment you are configuring.

Before configuring Copitrak Edge:
* Unpack and assemble the Edge terminal. For assembly and setup instructions, refer to the *Kofax Copitrak Edge Terminal Assembly and Installation Guide*.
* Ensure you have .NET 4.8 framework installed.
* Ensure you have a server with CSS installed that meets the minimum requirements for the Copitrak Edge in operation and on the network you are using.
* Ensure you download and install the most recent Copitrak Edge software files from the Partner Portal. See Upgrade Copitrak Edge software.

- Ensure that the TCP/IP configuration for the Edge terminal is appropriate for your environment. By default, Copitrak Edge is configured by DHCP; however, you may configure static addresses as well.

  ⓘ SMB sharing must be enabled on the CSS server to allow communication.

- Ensure you know the IP addresses of all the relevant CSS servers in your environment, and that these servers are able to communicate over the network with Copitrak Edge. Edge communicates with the CSS server using TCP port 4140.
- Ensure you have the foreign device interface cable that is appropriate for your device from Kofax. This cable is the main interface between the Edge terminal and the MFP. It must be present to allow Copitrak Edge to disable or enable the MFP for photocopying, and to collect the page count and distinguish the paper types (small/large format) accordingly. Consult your sales representative and/or copier vendor for information about acquiring and configuring the cable for the device.
- Define terminal and user groups based on the customer's business requirements, terminal types (cost recovery functions), language requirements, and sites. See Operation overview.

  ⓘ This requirement assumes that the default "REGULAR" group types have been created during deployment.

Minimum requirements

The following list contains the minimum requirements to run Copitrak Edge on an Edge terminal:
- Microsoft Windows 10 IoT Enterprise Edition, LTSB
- Edge hardware requirements as outlined in the *Kofax Copitrak Edge Terminal Assembly and Installation Guide*
- Copitrak Server CSS 700 R2 SP2

Change the administrator password

ⓘ When shipped, all the Edge terminals use the same default, publicly-known Windows administrator password. It is critical for security reasons to change the password to something unique for your enterprise and terminal. Follow the best security practices when setting up a master password.

1. Log in to the Edge terminal using credentials **User** and password **09182736**.
2. Press **Windows key+X** to display the list of windows options, and select **Computer Management**.
3. In the left pane, expand **Local User and Groups** and select the **User** folder.
4. Right-click on the user named **User** and select **Set Password**.

5. In the **Set Password for User** dialog box, click **Proceed**.
   A new dialog box opens allowing you to change the password.
6. Enter a new password, then type it again in the **Confirm Password** field. Click **OK**.
   Be sure to note the password for future reference.
7. Click **OK**, and then close **Computer Management**.

Change IP settings

To access the configuration screens of a Copitrak Edge terminal, do the following.

1. On the **Enter User ID** screen, select the Edge user and click **Sign in**.

   ⓘ If you have not yet changed the administrator credentials from the default shipped login, do it now. See Change the administrator password.

2. Enter **09182736** in the **Enter User ID** field, then press **Ctrl+R** on the keyboard.

   ⓘ You can also access this screen by using the keypad on the Edge terminal to key in **Clr** > **Clr** > **Space** > **Clr**, and then selecting **Basic Configuration** from the dialog box that displays.

   Once you are logged in to the configuration screen, enter the following configurations:
   • Terminal IP address (if the terminal is not using DHCP, enter the IP address, subnet mask, gateway IP address)
   • CSS server IP address (Main Host IP)

   ⓘ Server-side IP addresses use a three-digit IP convention, that is, xxx.xxx.xxx.xxx. A leading zero must be added to any IP value less than 100. For example, 010.000.000.001. This does not apply for IP addresses assigned to the Edge terminal itself.

3. The Edge terminal must be configured with some basic information including the Main Host IP address in order to allow connections between the device and the host.

   ⓘ It is at the discretion of your enterprise to manage Edge connections to join the company domain, group policy, and Windows updates. Ensure that whatever your setup, it does not inhibit the terminal from accessing the sharing resources (UNC path sharing, TCP/UDP ports, and so forth) in order to have Scan, Print and Copy workflows function properly.

4. In the **Enter Terminal ID** field, provide the ID for the terminal.
   This ID must be unique and not exceed 8 alphanumeric characters.
5. Press **Enter** by either using the hard keypad or the on-screen button.
   The DHCP screen opens.

6. In the **Turn on DHCP?** field, enter **Y**.

> ⓘ If you are using a static IP address for your installation, enter **N** into this field, and then enter the IP address for your installation into the **Enter Unit Fixed IP** field.

If the MAC address of a terminal is required, and you cannot reboot the device, it is printed on a silver label on the processor component of the Edge terminal. MAC addresses are unrelated to the terminal serial numbers. They are associated with the vendor of the Edge motherboard.

7. Press **Enter** by either using the hard keypad or the on-screen button.
    The **Main Host IP** screen opens.
8. In the **Enter Main Host IP** field, enter the IP address of the CSS server, or the server hostname if configured in DNS.
9. Press **Enter** by either using the hard keypad or the on-screen button.
    The server is now set.

Configure Copitrak Edge settings

The Configuration Manager is the primary configuration application, and is used to configure most of the system. You can access the application on the CSS server. For the purposes of setting up Copitrak Edge, only the **Terminal/User Options** settings within the Configuration Manager are necessary. All other settings options are outside of the scope of this document.

For more information, contact Kofax support.

Access Configuration File Manager

To access the Configuration File Manager, log in with server administrator credentials to the server where CSS is installed. Do the following.

1. Access the Copitrak folder on the desktop of the server.
2. From within the Copitrak folder, double-click **Config File Manager** to launch the application.
3. Enter **ERS** into the login field, then click **Login**.
4. From the list of available options, click **Terminal/User Options**.
    The **Configuration File Manager** opens.

Operation overview

Copitrak Edge uses three types of groups:
- Terminal groups
- User groups
- Language groups

A combination of the settings outlined in these three groups define a user's experience and access to the workflows. For example, a user ID can be configured in the following way.

A terminal group in a given head office is configured with four workflows. A user group can then restrict access to only one of the four configured workflows. The language displayed on the GUI is

based on which language group this user belongs to. In this scenario, when the user logs in, the combination of these three groups delivers the correct experience for this particular user.

These groups are configured by modifying their key settings using the **Config File Manager** application. Terminal and user groups define the overall operation of the terminal, what the user sees, and is required to input. Language groups offer the ability to designate specific languages based on particular criteria. New groups can be created to present different prompts to the users and present different screens for various cost recovery functions such as copy and scan.

The terminal and user groups must have a default group to capture any user or terminal that does not fall into one of the defined groups.

ⓘ Group assignments work in a cascade fashion. The settings defined in the group assigned to a particular device take precedent when defining how the device behaves. If a required key setting is not defined in the assigned group, the default group acts as a catch-all, allowing all circumstances to be covered. If you are satisfied with default settings for your particular use case, you do not need to define those settings in the custom group(s) you define. These default groups (identified by the "REGULAR" suffix in the case of terminal and user groups) are set up at installation.

Configuration File Manager

The Configuration File Manager is divided into two primary areas:
- The left pane lists all the existing language, terminal, and user groups, and allows you to select each group's key settings.
- The right pane allows to you modify a selected key setting.

Typically, when changing any key setting, you locate the key within the appropriate group on the left pane. Once selected, the key's information auto-populates to on the right pane, where the settings can be updated.

For example, if you want to limit the timeout value of a copy session for a particular terminal group, follow the steps in Limit the timeout value of a copy session for a particular terminal group.

This process applies to all key value change operations that are listed in the following sections.

ⓘ There are many key settings that are configurable through the Configuration File Manager. Most of these key settings are outside of the scope of this document. The key settings in this document are the settings you are most likely to require in normal operations. Typically, the default settings defined in the default groups suffice for the remaining settings. For detailed information about key settings, contact Kofax Support.

Limit the timeout value of a copy session for a particular terminal group

1. Select the terminal group you want to work with, and expand it by clicking **+** to disclose the key settings for the group.
2. Locate the key setting you want to change.
   Depending upon the number of keys in the group, you may need to scroll the list.
3. Select the key to view its current values.

4. Change the value of the key by entering the new value (in seconds) into the available field.
5. Click **Set In This Group**.
    The key values are updated.

Create custom groups

The following sections list the group types and how to set them.

Terminal groups

Terminal groups control the following terminal functions and operations:
- Terminal hardware features such as keyboards, proximity cards, and displays
- Communications with CSS host server
- Mode selection buttons
- Enter User ID and Lawyer Screens
- Copy, Scan, and Disbursements tracking functionality
- Terminal software upgrades

Terminal groups are used to group Edge terminals that have a common functionality. For example, a small law firm could have 14 terminals, 10 connected to copiers that only copy and print (no scan) and 4 terminals connected to only scan. This configuration requires two terminal groups: copy and regular.

The regular group is the default group and is used to designate the settings of any terminals that are not configured correctly (for example, undefined terminal IDs).

Set up a new terminal group, user group, or language group

Use Configuration File Manager to set up a new group.
1. Open the Configuration File Manager and select **Terminal/User Options**.
    For details, see Access Configuration File Manager.
2. From the list of groups, select a REGULAR group:
    - If you are creating a terminal group, use TERMINAL_GROUP_REGULAR.
    - If you are creating a user group, use USER_GROUP_REGULAR.
    - If you are creating a language group, select LANGUAGE_GROUP_ENGLISH.

    Once selected, the group name is added to the **Enter Key Name** field on the right pane.
3. Enter the name that you want to assign to the group in the **Enter Key Name** field.
4. Click **Copy Selected Group**.
    The new group is displayed in the list of groups.

When you create groups using this method, the new groups contain all the key settings of the group they were originally copied from. You can now update the settings of the new group as needed.

Key settings

The following sections outline the key settings necessary to configure Edge for operation. Use the instructions outlined in Configuration File Manager to modify any of these settings. Review the available values and defaults in each table to learn about the available options for each key, and the descriptions to learn what it does.

Keyboard setup

Keyboard settings exist in terminal groups and are set with the following keys.

Enable keyboard sound

Settings	Values	Default	Description
EnableKeyboardSound	Y = Yes N = No	N	Enable keyboard sounds.

Select keyboard type

Settings	Values	Default	Description
KeyBoard	Q = QWERTY A = AZERTY key swap Z = QWERTZ key swap a = AZERTY true z = QWERTZ true	Q	Select keyboard type.

Enable touch keyboard

Settings	Values	Default	Description
KeyboardDefaultOn	Y = Yes N = No	N	Show the expanded keyboard when Smart Bar has no results.

Select keyboard font

Settings	Values	Default	Description
Font	W = Western C = Chinese	W	Font of touch keyboard defaulted on screen.

Touch screen settings

Backlight dim after (terminal groups)

Settings	Values	Default	Description
BackLightDimAfter	Number: 1–999	30	Idle time in seconds before backlighting dimmed.

Backlight level during job (terminal groups)

Settings	Values	Default	Description
BackLightLevelDuringJob	Number: 1–10	1	Backlighting intensity 1–10 during active jobs.

Backlight off after (terminal groups)

Settings	Values	Default	Description
BackLightOffAfter	Number: 1–999	300	Idle time before backlighting turns off.

Background image

Settings	Values	Default	Description
NoBackgroundImage	Y = Solid grey background W = Solid white background N = Background image	N	Select background style.

Host server address

This setting sets the host IP address, and also sets the host type to A (All). To change the host type, modify the Host_0_Type key in the TERMINAL_GROUP_REGULAR group.

Settings	Values	Default	Description
Host_0_Type	A = All T = Validations and transactions V = Validation only	A	Host server type.

Failover host server

The Copitrak Edge terminal can be connected to one or multiple (Host_0, Host_1, Host_2, Host_3) CSS systems by entering the IP addresses of the configured hosts. Multiple hosts are used in the

event of loss of communication with the primary host. If the connection is lost, the Edge terminal attempts to connect to another configured host.

When Copitrak Edge is configured to fail over to a second, third or fourth host, the main CSS system is typically configured with a Host_X_Type as "A", meaning this system validates and processes transactions. Other hosts are typically configured as "V" - validate only, so that in a fail over scenario, transactions are only processed once the main CSS system is back online. This is done so as not to have to process transactions in two or more systems.

The following table describes the settings used for the Host IP Address and Validation Method. These fields are configured in Terminal groups.

Settings	Values	Default	Description
Host_0	###.###.###.### (system IP)	Y	Enter host IP
Host_0_Type	A = All T = Validations and transactions V = Validation only	A	A = All T = Sets up the system to validate and process transactions V = Will only validate transactions
Host_1	###.###.###.### (system IP)	Y	Enter host IP.
Host_1_Type	A = All T = Validations and transactions V = Validation only	A	A = All T = Sets up the system to validate and process transactions V = Will only validate transactions
Host_2	###.###.###.### (system IP)	Y	Enter host IP
Host_2_Type	A = All T = Validations and transactions V = Validation only	A	A = All T = Sets up the system to validate and process transactions V = Will only validate transactions
Host_3	###.###.###.### (system IP)	Y	Enter host IP
Host_3_Type	A = All T = Validations and transactions V = Validation only	A	A = All T = Sets up the system to validate and process transactions V = Will only validate transactions
HostConnectionTimeout	Number: 3-30	5	Enter host connection timeout in seconds

Settings	Values	Default	Description
HostReconnect	U = System and user S = System N = Never	U	Reconnect host

Edge settings

Time zone synchronization

Edge terminals sync with Network Time Protocol (NTP) by default, using UTC. If NTP is unavailable, or your organization chooses to use one, an Active Directory domain sync can be used. In either case, both the Edge terminal and the CSS server must connect to the same NTP/Active Directory server to ensure their time signatures remain synced.

> ❶ If a static IP address is used, the time used is the value set on the device itself, and may differ from other devices both on and off the native network. We recommend using active directory association or NTP server to ensure the time is always properly set.

Terminal messages

Terminal messages can be configured in any of the terminal, user, or language groups. Configured messages scroll across the screen based upon their respective settings:

- Terminal messages run across the screen when being prompted for terminal settings
- User messages run across the screen when being prompted for user settings
- Language messages run across the screen when being prompted for language settings

Optionally, as many as three individual messages per group can be configured. These messages display in a ticker-tape fashion across the bottom of the Edge screen.

The settings are the same per group. Select the group to include the message, then alter the settings as per this table:

Settings	Values	Default	Description
Message1	Text: 128 char	Enter a terminal level message.	Message
Message2	Text: 128 char	Enter a terminal level message.	Message
Message3	Text: 128 char	Enter a terminal level message.	Message
No	Y = Yes N = No	Y	Y = Turns off all messages

Coms Down message

This key setting is found in the terminal group.

Settings	Values	Default	Description
ComsDownMessage	Text: 128 char	Communications are offline.	Enter a terminal level message that displays when Edge has lost communication with the server

User and lawyer validation

The following sections describe how to set up user and lawyer validation settings for Copitrak Edge.

User ID and user validation

The following section instructs you to set up how the User ID is to be entered and how to validate it. The following table describes the settings used for User ID and User Validation. These fields are configured in the terminal group.

Settings	Values	Default	Description
UserDefault	Text: 16 char		Enter a default User ID which will automatically appear at the "Enter User ID" prompt. Make sure the UserDefault exists in the ERS User Master and that the UserMask is set correctly.
UserMask	Text: 16 char	UUUUUUUU	See Lawyer ID and validation.
UserPrompt	Text: 128 char	Enter User ID	User is prompted with this text when asked for an ID.
UserReject	Text: 128 char	Invalid Entry... Try Again	User sees this response if an invalid User ID is entered.

Settings	Values	Default	Description
UserValidation	V = Validation L = Local D = Default O = Open C = Validation with open com fail v = V and password prompt o = O and password prompt c = C and password prompt		V = validates the User ID and if invalid shows the "UserReject" prompt. L = validates the User ID and if invalid shows the "UserReject" prompt. D = validates the User ID and if invalid shows the default "UserReject" prompt. O = skips an invalid User ID entry and proceeds to Account Code entry. C = validates the User ID even if communication to the ERS system is down. v = V validation followed by a password prompt. o = O validation followed by a password prompt. c = C validation followed by a password prompt.
UserGroupPrefix			
UserPasswordReject		Invalid Entry... Try Again	The response the user sees if an invalid password is entered.
UserPasswordPrompt		Enter Password	User Password prompt. Used when UserValidation is set to V, O, or C.

Lawyer ID and validation

The following settings are used to determine Lawyer ID and validation. All of these fields are configured from within a user group:

Settings	Values	Default	Description
LawyerAllowOverride	Y = Yes N = No	N	Enable Lawyer Validation Override, which displays an override button on the keypad.
LawyerAutoEnter	Y = Yes N = No	N	Enable Lawyer Auto Enter.

Settings	Values	Default	Description
LawyerDefault	Text: 16 char		Enter a default Lawyer ID which will automatically appear at the Enter Lawyer ID prompt. Make sure the LawyerDefault exists in the ERS User Master and that the LawyerMask is set correctly. ⓘ Used in conjunction with LawyerValidation=D.
LawyerDefaultToUser	Y = Yes N = No	Y	Default Lawyer Entry to User ID. If "N" is selected, the user will be prompted to enter in the Lawyer ID.
LawyerEnableSearch	Y = Yes N = No	N	Enable lawyer search.
LawyerGetFavorites	Y = Yes N = No	N	Show lawyer ID favorites.
LawyerMask	Text: 16 char	UUUUUUUU	Accepted length of the Lawyer ID. By default, it is 8 digits, but it can be extended to 16 digits.
LawyerShowNames	Y = Yes N = No	N	Show Lawyer Names in LTPRO drop down.
LawyerValidation	V = Validation D = Default O = Open C = Validation with open com fail	V	V = validates the Lawyer ID and if invalid, displays the "Invalid Entry...Try Again" prompt. D = the user does not receive prompt to enter Lawyer ID. O = skips an invalid Lawyer ID entry and proceeds on. C = validates the Lawyer ID even if communication to the ERS system is down.

User entry masks

Masks are used to force the user to enter values in specific formats. They determine how many and which alphanumeric characters are valid when a user enters a value. User entry masks are optional

and can be configured in many different ways with a maximum of 16 characters in length. Masks can be applied to the following user entry fields:

- User Mask
- Lawyer Mask
- Account Mask
- Description Mask
- General 1 Mask
- General 2 Mask

Mask Value	Description
O = Open w/Case	Allows user to enter lowercase letters, uppercase letters, numbers, and symbols.
U = Open UpperCase	Allows user to enter uppercase letters, numbers, and symbols.
A = Alpha	Allows user to enter uppercase letters.
B = Alph w/Case	Allows user to enter lowercase letters and uppercase letters.
S = Alpha + space	Allows user to enter uppercase letters and spaces.
Z = AlphaNum	Allows user to enter uppercase letters, numbers, and symbols.
Y = AlphaNum w/Case	Allows user to enter lowercase letters, uppercase letters, and numbers.
N = Num	Allows user to enter numbers.
M = Num + space	Allows user to enter numbers and spaces.
Any mask value letter used in lowercase, that is: o, u, a, b, s, z, y, n, and m.	Allows secure entry by displaying asterisks (*) instead of the letters/numbers typed in.

The number of characters designated indicates the minimum number of characters that the system accepts during a login attempt. For example, if a UserMask key is set to UUUU, the user must enter 4 uppercase letters, numbers, or symbols for a login attempt to be valid. If fewer than 4 characters are entered, validation does not happen. The system also does not allow a user to enter more than 4 letters, numbers, and/or symbols.

You can combine any of these values. For instance, to have three uppercase letters and three numbers, the mask value is AAANNN.

ⓘ Lowercase implies secure entry.

Account validation

The following table describes the settings used for Account Code Entry and Account Validation. These fields are configured in the user group.

Settings	Values	Default	Description
AccountAllowOverride	Y = Yes N = No	Y	Enable account override.
AccountAutoComplete	Y = Yes N = No	Y	Enable account auto-complete. Allows searching by account code only.
AccountAutoEnter	Y = Yes N = No	N	Enable account auto enter. Automatically adds the **Enter** button for the user after any characters are entered for the Account Code.
AccountDefault	Text: 32 char		Enter the Account Default Value. Enter a default Account value, which will automatically appear at the "Enter the Account Code" prompt. Make sure the AccountDefault exists in the ERS Account Master and that the AccountMask is set correctly.
AccountDefaultToSearch	Y = Yes N = No	N	Default Account Entry to Search. After the User ID is entered, you can decide to have the user enter the "Account Code" or be prompted to do a search on either the Account Code, Client or Matter.
AccountEnableSearch	Y = Yes N = No	Y	Allow search. Allow searching by account code or client.
AccountEnableSpeed	Y = Yes N = No	Y	Display user favorites.
AccountMask	Text: 32 char	UUUUUUUUUUUUUUUU	See User entry masks.
AccountShowLastJobs	Y = Yes N = No	Y	Display user last jobs.
AccountValidation	V = Validation D = Default O = Open C = Validation with Open Com Fail	V	Select validation method. D works with AccountDefault.

Advanced scanning

The following section describes the settings used to adjust the brightness and contrast settings for scanning.

Brightness settings

These settings are configured in the user group.

Settings	Values	Default	Description
EdgeQSBrightness	Y = Enabled N = Disabled		If enabled, this setting allows users to adjust the scan brightness.
EdgeQSBrightnessDefault	0 = 15% 1 = 30% 2 = 45% 3 = 60% 4 = 75% 5 = 90% 6 = Other. A user-selected value, between 1 and 100, that is not a predefined value. 7 = Default. The default value of the scan driver.	7	The default setting for scan brightness.

Contrast settings

These settings are configured in the user group.

Settings	Values	Default	Description
EdgeQSContrast	Y = Enabled N = Disabled		If enabled, this setting allows users to adjust the scan contrast.

Settings	Values	Default	Description
EdgeQSBrightnessDefault	0 = 15% 1 = 30% 2 = 45% 3 = 60% 4 = 75% 5 = 90% 6 = Other. A user- selected value, between 1 and 100, that is not a predefined value. 7 = Default. The default value of the scan driver.		The default setting for scan contrast.

Menu text

Menu language settings

These key settings are found in the language group.

Settings	Values	Default	Description
EGDE_KEY_SCAN_ADVANCED	Text	Advanced Options	Text for the advanced options menu.
EdgeQSBrightnessCaption	Text	Brightness	Text for the brightness submenu.
EdgeQSContrastCaption	Text	Contrast	Text for the contrast submenu.

Brightness language settings

These key settings are found in the language group.

Settings	Values	Default	Description
BRIGHTNESS_PROMPT	Text	Please enter a brightness value as a percentage (1-100).	The prompt that displays when "Other" is selected from Brightness settings.
EDGE_INVALID_BRIGHTNESS_MSG	Text	Invalid value. Please enter a value from 1-100.	A message that displays if a user enters an invalid brightness value.

Contrast language settings

These key settings are found in the language group.

Settings	Values	Default	Description
EDGE_CONTRAST_PROMPT	Text	Please enter a contrast value as a percentage (1-100).	The prompt that displays when "Other" is selected from Contrast settings.
EDGE_INVALID_CONTRAST_MSG	Text	Invalid value. Please enter a value from 1-100.	A message that displays if a user enters an invalid contrast value.

Copy tracking features

The following section demonstrates how to set up specific features used only by the Copy tracking functionality. These settings are configured in the terminal group.

Configure the terminal to sense copies through the copy port

Settings	Values	Default	Description
CopySenseMethod	S = Differentiation determined through the attributes of a single pulse D = Differentiation determined through the attributes of a double pulse (single pulse for black and white) T = Differentiation determined by the splitter box (MCIF) pulse timing M = Multiple pulses	S	Method used by Edge to determine the page color value based on the type of signal sent by the MFP. This setting only provides information on how to handle the basic signal from the MFP. Extended attributes handling is configured on each Edge device using the admin menu to select the make and series of the attached MFP.
CopyTypeDetect	A = Automatically determine based on pulse attributes P = The user is presented a list and selects the size	A	Discovery method to determine paper size values X, Y, Z, and z. ⓘ Valid only if CopySenseMethod = S.
CopyLog	Y = Logging on N = Logging off	N	Enable copy logging for troubleshooting purposes.

Copy enable credit

CopyEnableCredit allows the user to apply a credit. For example, in the case where a copy job is sent to the wrong account, or a paper jam or out of toner error occurs. This field is configured in the terminal group.

Settings	Values	Default	Description
CopyEnableCredit	Y = Yes N = No	N	Enables credit for copies.

Copy show client name

Settings	Values	Default	Description
CopyShowClientNames	Yes = Yes N = No	N	Shows client name during copy job.

Discard active transaction

If Copitrak Edge is installed on a desktop, you can close the application using the **X** button in the top right corner. If a transaction is active, you are prompted to discard the current transaction before you can close the application.

Settings	Values	Default	Description
EDGE_DISCARD_CONFIRM_TITLE	Text	Discard Active Transaction.	Dialog box title when prompting the user to confirm the canceled transaction and exit.
EDGE_DISCARD_CONFIRM_MSG	Text	Quitting will discard the current transaction. Continue?	Dialog box text when prompting the user to confirm the canceled transaction and exit.
EDGE_SHUTTINGDOWN_MSG	Text	Disconnecting from the CSS server and Shutting Down.	Message to display in the broadcast message while Edge is cancelling the current transaction and disconnecting from the CSS server.

End a copy session

During a single login session a user can produce multiple copy jobs. Once done, the user typically logs out of the terminal using the **End** button. The following key settings control the way in which the terminal ends a user's session.

Settings	Values	Default	Description
CopyHoldEnd	Y = Yes N = No	N	Holds copy jobs until scanner confirms job completion with a "PHRASE_JOB_ENDING" message, which is set in LANGUAGE_GROUPS.

Settings	Values	Default	Description
CopyEndTimeout	seconds	1	Enter a time limit to keep the copier message on screen after the **End** button is pressed.

Manual entry of copy types by user

With some color copiers and MFPs that do not provide a color signal, the Edge terminal can only detect a single page type. In this case, the terminal can be configured to display a screen for the user to manually enter the copy type (color or BW), and page size.

Settings	Values	Default	Description
CopyTypeAfter	D = Description A = Account L = Lawyer 3 = General1 4 = General2	D	Selects field for which to prompt for copy type. ⓘ Works only if CopyTypeDetect = P.

Set copy limits for users

The following key settings can be used to set copy limits for users. This feature is to limit the size of copy jobs on low speed copiers, forcing the user to move the copy job to a more cost effect and/or high speed copier.

Settings	Values	Default	Description
CopyLimit	Number: 0-99	100	Sets a limit for a single copy job.
CopyLimitOptions	X = Cut off x = Cut off (NB only) D = Force description D = Force description (NB only) N = No action	X	Select the action when the copy limit is exceeded. Works with CopyLimit. ⓘ If CopyLimitOption = D (force description) and if DescValidation = D, then the user is not forced to enter a description, even though the CopyLimitOption specified it.

In user group

Settings	Values	Default	Description
ColorCopyLimit	Number: 0-999	0	Sets the maximum number of color copies allowed.

Set up copy page types

There are four page types, represented by four separate Copy Types:

- CopyType1 = Small black and white
- CopyType2 = Small color
- CopyType3 = Large black and white
- CopyType4 = Large color

Settings	Values	Default	Description
CopyType1 | CopyType2 | CopyType3 | CopyType4	Name = Page type description Rate = Cost Pulse Count = Number of pulses	Communications are offline.	Copitrak Edge supports 4 page types, which can be configured with their own values. ⓘ Rate and Pulse Count are optional values. Pulse count is only used when CopySenseMethod = S and CopyTypeDetect = A.
CopyType5	Name = Page type description Rate = Cost		Used only for scan. Rate value is optional.

Description functionality

The following sections include the description functionality settings for Copitrak Edge.

Description default

This key setting is found in the user group.

Settings	Values	Default	Description
DescDefault	Text: 64 char	D	Enter a default job description that always displays at the Job Description Prompt.

Description minimum length

This key setting is found in the user group.

Settings	Values	Default	Description
DescriptionMinimumLength	N: 0-64	1	The minimum number of characters allowed for a job description. ⓘ Description values must meet the minimum value or are considered an invalid entry.

Description prompt

This key setting is found in the language group.

Settings	Values	Default	Description
DescPrompt	N: 0-128	Enter Job Description	Enter the prompt users see for prompting a job description.

Description prompt scan

This key setting is found in the language group.

Settings	Values	Default	Description
DescPromptScan	N: 0-128	Enter Job Description	Enter the prompt users see for prompting a job description for SCAN mode only.

Description reject

This key setting is found in the language group.

Settings	Values	Default	Description
DescReject	N: 0-128	Invalid Entry... Try Again	Enter the description reject message users see if the job description entered is invalid.

Description validation

This key setting is found in the user group.

Settings	Values	Default	Description
DescValidation	D = Default P = Pick list O = Open entry Z = Open or pick list z = Z with no auto enter on pick list	D	D = There is no prompt. Enter Job Description. O = Can select from the pick list or enter any description. P = Can select only from the pick list. Z = Can select from the pick list or enter any description. z = Can select from the pick list or enter any description but **Enter** must be pressed to continue.

Force job description

This key setting is found in the terminal group.

Settings	Values	Default	Description
ForceJobDescription	Y = Yes N = No	N	Forces the user to enter a job description for every transaction.

Next key skip description

This key setting is found in the terminal group.

Settings	Values	Default	Description
NextKeySkipDescription	Y = Yes N = No	N	Skip Past Description and Page Type Prompt on Next Key.

No description copies

This key setting is found in the user group.

Settings	Values	Default	Description
NoDescCopies	Y = Yes N = No	N	If NoDescCopies = Y, the user is never prompted to enter a Job Description on any copy job.

No description disbursement

This key setting is found in the user group.

Settings	Values	Default	Description
NoDescDisb	Y = Yes N = No	N	If NoDescDisb = Y, the user is never prompted to enter a Job Description on any print job.

No description print

This key setting is found in the user group:

Settings	Values	Default	Description
NoDescPrint	Y = Yes N = No	N	If NoDescPrint = Y, the user is never prompted to enter a Job Description on any print job.

No description scan

This key setting is found in the user group.

Settings	Values	Default	Description
NoDescScan	Y = Yes N = No	N	If NoDescScan = Y, the user is never prompted to enter a Job Description on any scan job.

Phrase field description

This key setting is found in the language group.

Settings	Values	Default	Description
PHRASE_FIELD_DESCRIPTION	Text: 129 char	Description	

Phrase key description

This key setting is found in the language group.

Settings	Values	Default	Description
Phrase_Key_Desc	Text: 15 char	Desc	Text shown for on-job description key.

Phrase invalid description

This key setting is found in the language group.

Settings	Values	Default	Description
Phrase_Key_Desc	Text: 128 char	Invalid Description	

Set the currency

Settings	Values	Default	Description
Currency	Text: 32 char	USD	Enter the Currency name.

Set timeouts

If a user does not end a copy session by pressing the **END** button, the terminal is configured by default to automatically log the user out after a set inactivity period.

Settings	Values	Default	Description
CopyTimeout	Seconds	180	A timeout value for Copy jobs in seconds.
CopyWarningBellTime	Seconds	20	Sets a copier audible alert time.
CopyXtnd	A = Incremental Reload (1-999) R = Reload (1-999) N = No Y = Infinite	A, 300	A = Adds additional specified time. R = Places the counter back to the specified time (does not add any more time). N = Not allow to extend or add additional time - no key provided. Y = Waits until the copy is done and the end key is pressed.

Show description key

This key setting is found in the user group.

Settings	Values	Default	Description
ShowDescKey	Y = Yes N = No	Y	Shows Job Description Key. ⓘ The description validation must be set to D for the key to be shown: DescValidation=D.

Pull scan options

This section lists the options used by the Pull Scan features. These settings are configured in the user group settings.

Color settings

Settings	Values	Default	Description
EdgeQSColor	Y = Yes N = No	N	Allows the user to select the scan color mode when enabled.
EdgeQSColorDefault	0 = Auto 1 = B&W 2 = Grayscale 3 = Full Color	0	Default color mode.
EdgeQSColorAuto	Y = Yes N = No	N	Allows the scanner to select the color mode automatically.
EdgeQSColorBW	Y = Yes N = No	N	Allows the user to select the black and white color mode.
EdgeQSColorGray	Y = Yes N = No	N	Allows the user to select the grayscale color mode.
EdgeQSColorFull	Y = Yes N = No	N	Allows the user to select the full color mode.

Image touchup settings

Auto-rotate

Settings	Values	Default	Description
EdgeQSAutoRotate	Y = Yes N = No	N	Allows the user to choose if auto-rotate is on or off when enabled.
EdgeQSAutoRotateDefault	Y = Yes N = No	Y	Default auto-rotate setting.

Deskew

Settings	Values	Default	Description
EdgeQSDeskew	Y = Yes N = No	N	Allows the user to choose if the deskew setting is on or off when enabled.

Settings	Values	Default	Description
EdgeQSDeskewDefault	Y = Yes N = No	Y	Default deskew source.

Despeckle

Settings	Values	Default	Description
EdgeQSDespeckle	Y = Yes N = No	N	Allows the user to choose if the despeckle setting is on or off when enabled.
EdgeQSDespeckleDefault	Y = Yes N = No	Y	Default despeckle setting.

Orientation

Settings	Values	Default	Description
EdgeQSOrientation	Y = Yes N = No	N	Allows the user to select the page orientation setting when enabled.
EdgeQSOrientationDefault	Y = Yes N = No	Y	Default page orientation setting.
EdgeQSOrientationOriginal	Y = Yes N = No	N	Allows the user to keep the original page orientation.
EdgeQSOrientationPortrait	Y = Yes N = No	N	Allows the user to force the portrait page orientation.
EdgeQSOrientationLandscape	Y = Yes N = No	N	Allows the user to force the landscape page orientation.

Changing page orientation might change the image size.

Remove Hole Punch

Settings	Values	Default	Description
EdgeQSRemoveHolePunch	Y = Yes N = No	N	Allows the user to decide if the remove hole punch setting is on or off when enabled.
EdgeQSRemoveHolePunchDefault	Y = Yes N = No	Y	Default remove hole punch setting.

Original scan settings

Settings	Values	Default	Description
EdgeQSOriginals	Y = Yes N = No	N	Allows the user to change the scan document setting when enabled.
EdgeQSOriginalsDefault	Y = Yes N = No	Y	Default original document setting.
EdgeQSOriginalsSimplex	Y = Yes N = No	N	Allows the user to select simplex original documents.
EdgeQSOriginalsDuplex	Y = Yes N = No	N	Allows the user to select duplex original documents.

Paper orientation settings

This section describes the settings for the orientation of the paper placed on the glass or in the automatic document feeder (ADF). This might be from device to device and related to the direction of the short and long edges of the paper.

For Ricoh devices, orientation is judged based on where the scanner wand originates. If it scans left to right, portrait orientation is when the short edge is facing left and right, and landscape orientation is when the long edge is facing left and right. Note that this orientation is opposite to the way you are looking at the paper when you place it on the MFP.

Settings	Values	Default	Description
EdgeQSOrientation	Y = Yes N = No	N	Allows the user to change the scan orientation setting when enabled.
EdgeQSOrientationDefault	0 = As original 1 = Portrait 2 = Landscape	0	Default paper orientation.
EdgeQSOrientationPortrait	Y = Yes N = No	N	Allows the user to select portrait orientation scanning.
EdgeQSOrientationLandscape	Y = Yes N = No	N	Allows the user to select landscape orientation scanning.

Paper size settings

Settings	Values	Default	Description
EdgeQSPapersize	Y = Yes N = No	N	Allows the user to select the original document's paper size when enabled.

Settings	Values	Default	Description
EdgeQSPapersizeDefault	0 = Auto 1 = Letter 2 = Legal 3 = Tabloid 4 = Ledger 5 = A3 6 = A4 7 = A5	0	Default paper size.
EdgeQSPapersizeAuto	Y = Yes N = No	N	Allows the scanner to select the paper size automatically.
EdgeQSPapersizeLetter	Y = Yes N = No	N	Allows the user to select the letter paper size.
EdgeQSPapersizeLegal	Y = Yes N = No	N	Allows the user to select the legal paper size.
EdgeQSPapersizeTabloid	Y = Yes N = No	N	Allows the user to select the tabloid paper size.
EdgeQSPapersizeLedger	Y = Yes N = No	N	Allows the user to select the ledger paper size.
EdgeQSPapersizeA3	Y = Yes N = No	N	Allows the user to select the A3 paper size.
EdgeQSPapersizeA4	Y = Yes N = No	N	Allows the user to select the A4 paper size.
EdgeQSPapersizeA5	Y = Yes N = No	N	Allows the user to select the A5 paper size.

Paper source settings

Settings	Values	Default	Description
EdgeQSPaperSource	Y = Yes N = No	N	Allows the user to select where the paper is placed on the MFP when enabled.
EdgeQSPaperSourceDefault	0 = Enabled 2 = Disabled	0	Default paper source.
EdgeQSPaperSourceAuto	Y = Yes N = No	N	Allows the scanner to select the paper source automatically.
EdgeQSPaperSourceADF	Y = Yes N = No	N	Allows the user to select ADF as the paper source.

Settings	Values	Default	Description
EdgeQSPaperSourceFlat bed	Y = Yes N = No	N	Allows the user to select the glass as the paper source.

Resolution scan settings

Settings	Values	Default	Description
EdgeQSResolution	Number	N	Allows the user to change the scan resolution when enabled.
EdgeQSResolutionDefault	0 = 100 1 = 150 2 = 200 3 = 300 4 = 400 5 = 600	0	Default quick scan resolution.
EdgeQSResolution100	100	N	Allows a resolution of 100 DPI.
EdgeQSResolution150	150	N	Allows a resolution of 150 DPI.
EdgeQSResolution200	200	N	Allows a resolution of 200 DPI.
EdgeQSResolution300	300	N	Allows a resolution of 300 DPI.
EdgeQSResolution400	400	N	Allows a resolution of 400 DPI.
EdgeQSResolution600	600	N	Allows a resolution of 600 DPI.

User interface text

Buttons and menus

Settings	Values	Default	Description
EDGE_KEY_SCAN	Text		Text for quick scan button.
EDGE_KEY_SETU	Text		Reserved for future use.
EDGE_KEY_SCANMORE	Text		Text for scan more button on the preview screen.
EDGE_KEY_SCAN_NATIVE	Text		Reserved for future use.

Settings	Values	Default	Description
EDGE_KEY_SCAN_BASIC	Text		Text for scan options, such as resolution, color mode, and so on.
EDGE_KEY_SCAN_TOUCHUP	Text		Text for scan image touchup options.
EDGE_KEY_BACK	Text		Text for submenu back button to return to the previous menu.
EDGE_KEY_SETTINGS	Text		Reserved for future use.

User notification and dialog boxes

Settings	Values	Default	Description
EDGE_ERROR	Text		Text for generic errors.
EDGE_NOT_CONFIGURED_TITLE	Text		Text for dialog box title when scanner setup is required.
EDGE_NOT_CONFIGURED_MSG	Text		Text for dialog box message when scanner setup is required.
EDGE_SHARE_UNAVAILABLE_TITLE	Text		Text for dialog box title when the scan-in share is unavailable.
EDGE_SHARE_UNAVAILABLE_MSG	Text		Text for dialog box message when the scan-in share is unavailable.
EDGE_UPDATE_TITLE	Text		Text for dialog box title when an update is in progress. ⓘ This message only appears on a kiosk device. The update occurs during a desktop installation while the Edge software is running.

Settings	Values	Default	Description
EDGE_UPDATE_MESSAGE	Text		Text for dialog box message when an update is in progress. ⓘ This message only appears on a kiosk device. The update occurs during a desktop installation while the Edge software is running.

Submenus

Settings	Values	Default	Description
EdgeQSEnabled	Text		Text for enabled options.
EdgeQSDisabled	Text		Text for disabled options.

Scan option submenus

Settings	Values	Default	Description
EdgeQSResolution	Text		Text for resolution menu.
EdgeQSResolution100	Text		Text for 100 DPI resolution menu option.
EdgeQSResolution150	Text		Text for 150 DPI resolution menu option.
EdgeQSResolution200	Text		Text for 200 DPI resolution menu option.
EdgeQSResolution300	Text		Text for 300 DPI resolution menu option.
EdgeQSResolution600	Text		Text for 600 DPI resolution menu option.
EdgeQSOriginals	Text		Text for originals menu.
EdgeQSOriginalsSimplex	Text		Text for simplex menu option.
EdgeQSOriginalsDuplex	Text		Text for duplex menu option.
EdgeQSPaperOrientation	Text		Text for paper orientation menu.
EdgeQSPaperOrientationPortrait	Text		Text for portrait menu option.
EdgeQSPaperOrientationLandscape	Text		Text for landscape menu option.

Settings	Values	Default	Description
EdgeQSColor	Text		Text for color mode menu.
EdgeQSColorAuto	Text		Text for automatic color mode menu option.
EdgeQSColorBW	Text		Text for black and white color mode menu option.
EdgeQSColorGray	Text		Text for grayscale color mode menu option.
EdgeQSColorFull	Text		Text for full color mode menu option.
EdgeQSPapersize	Text		Text for paper size menu.
EdgeQSPapersizeAuto	Text		Text for automatic paper size menu option.
EdgeQSPapersizeLetter	Text		Text for letter paper size menu option.
EdgeQSPapersizeLegal	Text		Text for legal paper size menu option.
EdgeQSPapersizeTabloid	Text		Text for tabloid paper size menu option.
EdgeQSPapersizeLedger	Text		Text for ledger paper size menu option.
EdgeQSPapersizeA3	Text		Text for A3 paper size menu option.
EdgeQSPapersizeA4	Text		Text for A4 paper size menu option.
EdgeQSPapersizeA5	Text		Text for A5 paper size menu option.
EdgeQSPaperSource	Text		Text for paper source menu.
EdgeQSPaperSourceAuto	Text		Text for automatic paper source menu option.
EdgeQSPaperSourceADF	Text		Text for ADF paper source menu option.
EdgeQSPaperSourceFlatbed	Text		Text for glass paper source menu option.

Touchup options submenus

Settings	Values	Default	Description
EdgeQSDeskew	Text		Text for deskew menu.
EdgeQSDespeckle	Text		Text for despeckle menu.

Settings	Values	Default	Description
EdgeQSRemoveHolePunch	Text		Text for remove hole punch menu.
EdgeQSAutoRotate	Text		Text for auto-rotate menu.
EdgeQSOrientation	Text		Text for orientation menu.
EdgeQSOrientationOriginal	Text		Text for original orientation menu option.
EdgeQSOrientationPortrait	Text		Text for portrait orientation menu option.
EdgeQSOrientationLandscape	Text		Text for landscape menu option.

Configure pull scanning

The following sections describe how to configure pull scanning for Copitrak Edge.

Install TWAIN driver

Before installing the TWAIN drivers, ensure your device is running the most recent version of the software. Earlier versions may not contain the settings required for your driver. You can do this by performing an upgrade. See Upgrade Copitrak Edge software.

For scanning to function, the TWAIN driver appropriate to the MFP device being used must be installed to the Edge terminal.

1. Log in to the Edge terminal with administrator credentials.
2. Obtain the appropriate drivers for your MFP.

    Typically, these can be found hosted on the website of your MFP vendor.
3. Install the drivers using the appropriate procedure.

    These steps may vary from vendor to vendor. Typically, the drivers are distributed in an executable file, which is then run on the device. In the case of Ricoh, run the installer, and then follow the prompts from the Wizard to install the drivers to the Edge terminal.

Configure the scanner

You must be in front of the MFP during this process to facilitate the process. Be sure to run all the tests required by the system for a proper configuration.

1. Change the group policy in order to allow the Network Connection Tool to be run as the Edge user in Administration Mode:

    a. Log in to the Edge terminal with administrator credentials.

    b. Run the **Local Group Policy Editor** (gpedit.msc).

    c. Go to **Computer Configuration** > **Windows Settings** > **Security Settings** > **Local Policies** > **Security Options**.

    d. Double-click **Accounts: Limit local accounts use of blank passwords to console login only**, and set it to **Disabled**. Click **Apply**.

2. Go to the location on your system where the TWAIN Driver Installation program has been placed, and run it.

   Typically, this tool is included with the TWAIN driver package.

   For supported Ricoh MFPs, the driver package is TWAIN V4 Network Connection Tool. For supported Canon MFPs, it is ScanGear Tool.

3. Using the keyboard, press and hold **Shift**, then right-click the Scanner IP configuration tool icon and select **Run as different user**.

4. Enter **Edge** as the **User name**, and leave the **Password** field empty. Click **OK**.

5. Designate the IP address of the MFP using the vendor-specific software included with the driver package.

   This process differs by vendor.

6. Reboot the device.

   This returns the device to Kiosk Mode.

7. Press **Clr** > **Clr** > **Space** > **Clr** on the Edge terminal key pad.

   The **Edge Admin Menu** appears.

8. Select **Scanner Configuration** to open the Kofax Scanner Setup Wizard.

   For Ricoh and Canon devices, run the scanner configuration in Custom mode.

9. Follow the wizard to complete the scanner configuration.

   This process gathers the information required to bypass the native TWAIN user interface of the MFP.

Enable pull scanning

Use the Configuration File Manager to update the relevant keys. For detailed information on Configuration File Manager, see Configuration File Manager.

1. Launch the Configuration File Manager, then click **Terminal/User Options**.

2. If necessary, add new terminal, users, or language groups for your Edge terminals.

   See Create custom groups.

3. Select **Scan** at the top right of the screen to display the scan options only.

   This facilitates finding Edge-specific options.

4. On the left pane, select the terminal group used by the Edge terminal, then click **Set All Missing Entries to Default Values**.

   The list of available key configurations is updated to include the new terminal group settings.

   If you do not see these options, update to the latest version of the Copitrak Edge software.

5. Under the selected terminal group, update the following key values:

   - EdgePullScan: Set to **Y** to enable pull scanning.
   - EdgeScanInShare: Enter the folder share to the server's scan-in folder to change the default folder. The CSS installer typically creates this share under `\\cssserverhostname\scan-in`.
   - EdgeShareUsername: Enter a username that will be used to access the EdgeScanInShare folder.

- EdgeSharePassword: Enter the password that matches the username specified in EdgeShareUsername.

6. Set user group by selecting the user group in the option used by the Edge terminal. Click **Set All Missing Entries to Default Values**.

   The Edge user settings are used to specify quick scan setting default values and which quick scan settings are visible to the user. They are only relevant for pull scan Edge terminals.

   If pull scanning for the device is set up correctly, a **Scan** button appears on the top left screen.

Command line arguments file

Edge reads command line parameters from the %programdata\Kofax\CopitrakEdge \EdgeCommandParamsUTF8.txt file. The parameters must be in UTF8 format without a Byte Order Mark, and they are read from the first line of the file and the lines following that are ignored.

> ⓘ For backward compatibility, parameters from EdgeCommandParamsUTF8.txt were used in addition to those supplied on the CopitrakEdge.exe command line. However, the parameters will no longer be supplied on the CopitrakEdge.exe command line and only come from EdgeCommandParamsUTF8.txt now.
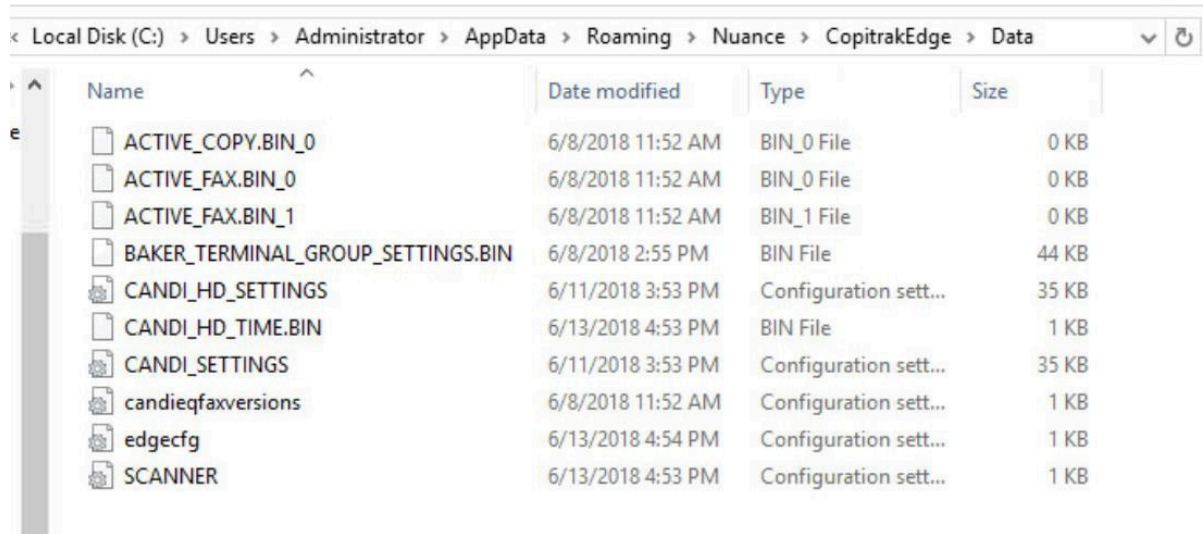
Configure in Admin mode

1. Log in as a standard Edge user (**Edge** on).
2. Run the Edge software.
3. Press **Clear+Clear+Space+Clear** and select **Copy Configuration**.
4. Select the MFP Make and Series.

5. Log off and log in back again as Admin.

6. Verify that a new configuration file edgecfg.ini is generated in the AppData folder, and the content inside is matching the selection in step 3.

Configure Kiosk mode in Copitrak Edge

Kiosk mode is a special mode in which the Kofax Copitrak Edge application replaces the standard Windows shell and runs full screen. Kiosk mode is a per-user setting. Therefore, some users might be configured for Kiosk mode while other users are not configured.

This is the standard configuration on the Copitrak Edge hardware. In addition, the Kiosk mode user on the Edge terminal is configured without a password and is set to log in automatically when the machine starts.

> 🛈
>
> - The Copitrak Edge application is optimized to run with a resolution of 1024x768 scaled to 125%.
> - Since Kiosk mode is a per-user configuration, perform the configuration while logged in as the user who will be using Kiosk mode.

Enable Task Manager

If Task Manager is disabled, you must enable it to run the Registry Editor for the Kiosk mode configuration on the Copitrak Edge hardware.

1. Log in as an administrator (**admin** on).
2. Run the Local Group Policy Editor (`gpedit.msc`).
3. Go to **User Configuration** > **Administrative Templates** > **System** > **Ctrl+Alt+Del Options**.
4. Double-click **Remove Task Manager** and set it to **Disabled**.

Configure Kiosk mode

1. Log in as the user targeted for Kiosk mode (**Edge** on).
2. Click **Ctrl+Alt+Del** and select **Task Manager**.
3. Select **File** > **Run new task** from the menu and run `regedit`.
4. Go to `HKEY_Current_User\Software\Microsoft\Windows NT\CurrentVersion\Winlogon`.
5. Change the value of the Shell key based on the Edge installation location.

   For example: `C:\Program Files (x86)\Kofax\Copitrak Edge Software\CopitrakEdge.exe`.
6. Reboot.

> ⓘ
>
> - Once the configuration is complete, consider disabling Task Manager by setting it back to **Enabled** to prevent users from accessing the system options. Users can still run any local application using File or Run.
> - Perform a reboot before using Copitrak Edge. Once you log back in as the Edge user, Copitrak Edge is automatically logged in.

Verify configuration in Kiosk mode

1. Log in as the user targeted for Kiosk mode (**Edge** on).
2. Press **Clear+Clear+Space+Clear** and select **Copy Configuration**.

The Copy Configuration can also be updated from the standard Edge user. Once the Copy Configuration is updated, you need to log off and log in back again as a standard Edge user for the changes to be applied.

Copitrak Edge Updater Service

The Kofax Copitrak Edge Updater consists of three components:

1. Package on the CSS server: CopitrakEdgeBundle.x.y.zzz.exe and .sha1 file.
2. Internet Information Services (IIS): Leverages the existing IIS Server running on the client's CSS and delivers the package across the client's network to the Edge terminals via HTTP.
3. Edge Updater Service: Windows service running on each Edge client that acquires and installs the update.

Package on the CSS server

This package creates an EdgeUpdates folder and shares it on the CSS server.

Copy the CopitrakEdgeBundle.x.y.zzz.exe and .sha1 files to the EdgeUpdates folder.

Internet Information Services (IIS)

Once the package is created, it is deployed to the client's systems via HTTP using the IIS server running on the CSS server.

Complete the following configuration steps.

1. Create a virtual directory in IIS.
2. Create a web.config file that contains the following text, and save it to the EdgeUpdates folder.

```
<?xml version="1.0" encoding="UTF-8"?>
<configuration>
    <system.webServer>
        <staticContent>
            <mimeMap fileExtension=".sha1" mimeType="text/plain" />
        </staticContent>
    </system.webServer>
</configuration>
```

3. Set the **EdgeUpdaterURI** terminal group setting to the full path pointing to the Edge bundle exe file.

   For example: http://*CSS_server_host_or_IP*/EdgeUpdateFolder/CopitrakEdgeBundle.x.y.zzz.exe

   ⓘ Since this is a terminal group setting, you can maintain multiple installed versions of the Edge software for different clients (such as Generic Windows Tablet and Edge Dedicated Hardware). To maintain multiple installed versions, create a terminal group for each unique set of clients with **EdgeUpdaterURI** pointing to their own unique update virtual directory in IIS.

Edge Updater Service functions

The Edge Updater Service is a Windows service that performs the following actions:

1. Download the package's hash file CopitrakEdgeBundle.x.y.zzz.sha1.
2. Determine if an update of the local Edge software is required.
3. Download the update package.
4. Close any programs and services that are running.
5. Apply the update.
6. After installation, when running in Kiosk mode, the system will prompt to reboot. If a silent installation is performed, the system will reboot automatically.

On non-Kiosk mode Edge, the system attempts to restart programs and services without rebooting. The system only restarts the Copitrak Edge application if:

1. There is only a single user session on the machine running Copitrak Edge.
2. The Copitrak Edge application was running at the time the update began.

Edge Updater Service installation

The Edge Updater Service is installed with the Copitrak Edge software when it is initially deployed to a device.

To perform the installation, run one of the following commands:

- For genuine Copitrak Edge hardware or tablets running in Kiosk mode:

  ```
  .\CopitrakEdgeBundle.2.5.zzz.exe LcWinHost=CSS_server_IP TerminalId=terminal
  DeviceType=KIOSK
  ```

- For Desktop:

  ```
  .\CopitrakEdgeBundle.2.5.zzz.exe LcWinHost=CSS_server_IP TerminalId=terminal
  ```

where `LcWinHost` is the CSS server IP address and `TerminalId` is the terminal to be used.

> ⓘ
>
> - Commands are case-sensitive.
> - If you are installing on a genuine Copitrak Edge hardware or tablet, the Edge terminal automatically reboots when the Copitrak Edge software is updated with the Updater Service.
> - If you are installing for Kiosk mode using the DeviceType=KIOSK parameter, the Edge terminal prompts you to reboot when the installation is complete.
> - If you are installing on desktop, you do not need to reboot after an installation.

Edge Updater Service folder

When the Updater Service is installed on an Edge client, the following files appear in the `C:\Programs Files (x86)\Kofax\Copitrak Updater Service` folder:

- EdgeUpdaterService.exe
- EdgeUpdateService.exe.config
- LcWinClientLib.dll
- SessProcLauncher.exe

Registry Editor keys

The Updater Service installs the following Registry Editor keys in `HKEY_LOCAL_MACHINE\SOFTWARE\WOW6432Node\Nuance\CopitrakEdge`.

- Default
- HardwareRevision
- InstallationLocation
- InstalledVersion
- LcWinHost
- TerminalId
- DeviceType

Troubleshooting

Pull (TWAIN) scanning is a standard that includes many capabilities. Not every capability is available with every device/driver, and some implementations do not consistently follow the standards for others. For the Copitrak Edge terminal, this makes custom configuration necessary for various device/driver combinations to scan correctly. Some trial and error may be necessary to correctly configure Copitrak Edge.

This guide includes some common issues and their possible solutions.

Hints

By default, the Edge terminal's scanning engine uses a series of default values. Sometimes, these defaults need to be overridden to ensure that the configurations are correct and a successful scan can be performed from the device. You can override default values using hints. During the setup process, the wizard may determine that some hints are necessary and pre-set them. At other times, you may need to manually edit the hints. Hints are configured on the last page of the Scanner Setup Wizard. Before you click **Finish**, click **Review Hints** to enter the hint editor and review the hints.

If you have already run through the scanner tests, you can re-enter the wizard to edit the hints. When doing so, select and test your scanner but when given the opportunity, clear the **Perform Test** option. This will allow you to navigate directly to the last page of the wizard and enter the hint editor.

Once you edit a hint, try to scan again. If you are still experiencing a scanning issue, try re-running the complete scan setup and testing process with the hints set as that may lead to more optimal results. If the scanning issues persist, you might want to start again by removing all hints and running the complete set of scan tests again.

Enable pull scan debugging

When all else fails, you must collect the detailed logs produced by the scanning engine for Kofax Support. You can collect detailed logs in the SCANNER.INI file. Once you edit the required settings, restart the Edge terminal to enable the logging. By default, this file will be found in `%APPDATA%\Nuance\CopitrakEdge\Data\SCANNER.INI`.

Removing the leading underscore of the LogLevel in the three sections (RSD, TWAIN, WIZARD) will enable detailed logging.

> ⓘ
> - You can change the log folder by changing the LogFileU value. All logs are created in that folder by the RSD log file setting.
> - Performance, including application startup, is affected when pull scan logging is enabled.
> - Once logging is enabled, small dialog boxes appear at various times during scan engine initialization and scanning. This is normal. When logging is disabled, these dialog boxes will no longer appear.

```
[RSD]
LogFileU=C:\Users\Copitrak\AppData\Roaming\Kofax\CopitrakEdge\Debug\R nRSDu.LOG
LogLevel=127

[Wizard] LogLevel=127

[TWAIN]
LogLevel=127
```

Common issues

The following sections describe the common issues that might occur and their possible solutions.

Unable to scan from native UI dialog during Scanner Setup Wizard

Description: The Scanner Setup Wizard begins its test by using the scanner driver's native UI. Since the Edge Kiosk mode has a limited resolution, it is possible that the driver's UI requires a higher resolution and some of the dialog boxes is cropped due to insufficient screen real estate.

For example, the Konica Minolta UI is displayed in such a way as the **Scan** button is inaccessible, making tests impossible.

Solution: Log in as the admin user, perform the tests, and copy the configuration. Do the following.

1. Log in as the admin user, and run CopitrakEdge.exe manually.

2. Complete the Scanner Setup Wizard.

3. Copy the SCANNER.INI file from the admin user's AppData folder `C:\Users\User\AppData\Roaming\Kofax\CopitrakEdge\Data` to the Edge user's AppData folder `C:\Users\Edge\AppData\Roaming\Kofax\CopitrakEdge\Data`.

4. Log back in as the Edge user.

5. Run the Scanner Setup Wizard by doing the following:

    a. Select **Select and test scanner or digital camera**.

    b. Verify that the correct scanner is selected.

    c. Clear the **Perform tests** and **Start from settings of normal mode** check boxes.

6. Navigate to the end of the wizard, and click **Finish**.

Pull scan is not available

Description: If you do not see the **Scan** button or the scan options, it is possible that the driver's native UI is not bypassed as required. Some drivers may simply not provide this capability, while others may require a custom configuration.

You can determine if a quick scan is available from the scan screen on the Edge UI. It is enabled if the **Scan** button and quick scan and touchup submenus are displayed once you log in to a scan route and complete the accounting prompts. If these items are missing, the scan engine has determined that quick (pull) scan is not available.

Solution:

1. Ensure that the pull scan is enabled in the terminal group setting EdgePullScan.

2. Run the Scanner Setup Wizard again. Select and test the scanner in custom mode. Make sure to complete all tests including all ADF tests.

> ℹ If the above solution does not resolve the problem, it is possible that your device/driver does not support the Native UI Bypass feature. Enable TWAIN logging (see Enable pull scan debugging) and send those logs to Kofax Support for analysis.

Scanner Setup Wizard does not respond when downloading scans during scan tests

Description: Some drivers/devices do not fully support the latest TWAIN protocol.

Solution: Specify the TWAIN version for the scanning engine to use.

Hint: TWAINVERSION

Value: 1.9

Only 'Auto ADF' is displayed as paper source option

Description: By default, **Auto ADF** is the only option available. This is to simplify the user experience. If you want the user to have the choice to explicitly select the paper source, use the following solution. Note that by changing this hint, Auto ADF will no longer be an option.

Solution: Disable **Auto ADF** by changing the **AUTOADF** hint to **No**. **Auto ADF** will no longer be an option, and ADF and Flatbed (glass) will be available for the user to select explicitly.

Hint: AUTOADF

Value: NO

A standard paper size is being reported as not supported

Description: Paper size capabilities are the items that the Scanner Setup Wizard tries to determine during the configuration process. If you are using a standard paper size and the Edge is reporting

that it is not supported, you may need to re-run the wizard after specifying the dimensions of the scanner. Note that the wizard gives you the opportunity to review and add/remove paper sizes during the testing phase. There are two sets of values that can be set: the glass size and the ADF size. If the ADF size is not specified, the glass size values are used for both.

Solution: Specify the maximum width and height supported by the scanner. This information should be available in the scanner's documentation.

Hints for the glass size: MAXHEIGHT and MAXWIDTH.

Hints for the ADF size: MAXADFHEIGHT and MAXADFWIDTH.

Values: The size as a number in 1/1200ths of an inch.

Device does not scan

Description: There are two mechanisms that can be used to transfer scanned images from the device/driver to Kofax applications. If scanning is failing, you can try to explicitly specify which mechanism to use.

Solution: Experiment with the image transfer.

Mechanism hint: XFERMECH

Possible values:
- MEMORY

  Image transfer is performed through memory buffers. This is the fastest way to get the image.
- NATIVE

  Image transfer is accomplished through a BMP file. This transfer mode is slower but safer than the memory mode.

Scan orientation is not respected

Description: With TWAIN, you have two methods of setting the scan orientation. The first method is to specify an orientation property. Not all drivers implement this property. In such a case, try to specify the scan dimension as x and y coordinates. This feature is also not always available. In the case that both are not available, the resulting scans may be in the incorrect orientation.

Solution: When both capabilities are not present, do either of the following methods:
- Enable the Auto Rotate touchup feature, and set **Auto Rotate** to **Yes**.
- Instruct the user to physically change the paper orientation as placed in the scanner.
- Use the Edge preview UI to change the orientation (rotate individual pages, selected pages, or all pages).

Scanner configuration for Ricoh TWAIN driver cannot be completed in Kiosk mode

Description: This issue occurs due to the nature of the TWAIN driver for Ricoh. Ricoh TWAIN driver needs to have the IP address input so it can search for the scanner. Without the IP address, you

receive a "Scanner not found" error. This issue can happen to both Edge terminal and tablet in Kiosk mode.

Solution:

1. Start Task Manager, and start FileExplorer.exe.

2. Open the **Twain V4 Network Connection Tool** from Ricoh.

3. If an IP for Ricoh is not set, enter the IP address of the scanner. Search, and apply to confirm connection.

Now you can perform scanner configuration successfully.

Unable to verify LCWIN Host connection during CopitrakEdge Config Utility

Description: The CopitrakEdge Config Utility is using the new GetTerminalConfig method that does not claim a license. This was added in a recent version of LCWIN (LCWIN 2014.702.33.3887 or later). Since the command does not exist in the older LCWIN, the request is ignored.

You receive an "Unable to verify LCWIN Host connection" message when the CSS server has an older version of LCWIN (for example: 2014.702.30.8117).

Root cause: There is now a new Updater Service, which updates to the latest version of Copitrak Edge automatically. To configure the Updater Service to download the latest version of Copitrak Edge, a new Config Utility tool is provided. Use this Config Utility for configuring the Edge Updater Service. This will require a new version of LCWIN (2014.702.33.3887 or later) to function correctly. Otherwise, you get the above stated error.

The CopitrakEdge host settings are still set with the Basic Settings part of the Edge Admin Menu as it has always been done. If the Edge must be redirected to a different LCWIN host, it still needs to be done in the Basic Settings part in addition to the Config Utility tool as the Config utility will configure the Updater Service and the Basic Settings will configure the Copitrak Edge terminal.

Solution: Update LCWIN to latest version (LCWIN 2014.702.33.3887 or later) in the CSS server, then update LCWIN Host information for Updater Service with the Config Utility, and update Copitrak Edge host settings with basic configuration on the Edge terminal.

It is recommended to use the following steps to update the LCWIN Host information and CopitrakEdge host settings on the Edge terminal:

1. Update the Terminal ID and LCWIN Host information from the CopitrakEdge Config Utility.

   ⓘ The "Unable to verify LCWIN Host connection" message should not appear now.

2. Reboot the Edge terminal to log in to Kiosk mode.

3. Enter **Clr+Clr+Space+Clr** to access **Basic Configuration** from the **Admin** menu, and update the Host IP in **Basic Configuration**.

4. Log in, and start scan testing.

The colors of B&W scanned images are inverted in some scanners

Description: Some scanners invert the color of B&W images. For example, the black texts are displayed in white, and the white background is displayed in black.

Solution:

1. Open the Kofax Scanner Setup Wizard.

2. Navigate through the wizard and click **Review Hints** when displayed.

3. Based on the type of scan that is getting inverted, add or change the following hints to **YES**:
   - INVERTC (color)
   - INVERTG (grey scale)
   - INVERTB (black & white)

4. If step 3 above does not resolve the issue, retain the changed hints, and do the following steps:

   a. Open %programdata%\Kofax\CopitrakEdge\EdgeCommandParams.UTF8.txt with an editor such as Notepad.

   b. Add the exact following line to the first line in the file:

   ```
   /SM-GDIAuto
   ```

   > ⓘ Copitrak Edge has a default scan mode of direct-to-file that does not support the inversion hint settings for all scanners. Adding the line above causes Copitrak Edge to use a scan-to-memory-to-file approach that allows some hints such as the inversion settings to function properly.

   c. Save the file, and restart Copitrak Edge.

Black margins appear in scans

Description: Black margins sometimes appears in scanned documents.

Solution:

1. Open Config File Manager.

2. Add a new terminal group setting named **LegacyScannerMode**, and set its value to **NO**.

   For more details on how to create a new terminal group, see Set up a new terminal group, user group, or language group.

   > ⓘ **LegacyScannerMode** defaults to a value of **YES** and is used to support earlier versions of MFD scanners and their TWAIN drivers. However, margin is not supported in this mode. Switching the **LegacyScannerMode** to **NO** allows better scanner margin and hints configuration support.

3. Restart Copitrak Edge, and wait for the setting to be downloaded and applied.

'Auto' does not appear as an option in the page-sizing menu

Description: **Auto** does not appear as a selectable option in the Edge page-sizing menu even when the scanners support automatic page size detection.

Solution:

1. Open the Kofax Scanner Setup Wizard.

2. Click **Review Hints**.

3. Add **AUTOPAGESIZE** setting to the **Applied Hints**, and set it to **YES**.

> ⓘ The behavior might vary depending on different conditions. Contact Kofax Support for further technical assistance.

Normal operations thwarted by virus control software

Description: If installed, anti-virus software may impact proper operation of the system.

Solution: Add the Copitrak Edge folder on the server and the folders on the Edge terminal to the list of exceptions in the anti-virus software you are using.

Update in Progress window persists

Description: During updates, the "Update In Progress" window displays and does not close by itself.

Solution: Updates typically complete in seconds. If you are waiting longer, log out of the device, and log back in to clear the window.

Kofax Reader Maintainer disables the card reader

Description: Use of the Kofax Reader Maintainer tool can disable card readers when they are configured while connected to the device.

Solution: If this situation occurs, disconnect the MINI-DIN cable at the back of the Edge base for 10 seconds and reconnect it. This re-enables the reader with the new settings.