

Kofax Communication Server

Secure Email for MFP Integration Technical Manual

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The KOFAX logo is displayed in a bold, blue, sans-serif font. The letters are thick and closely spaced, with a consistent blue color throughout.

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Chapter 1

Preface

This manual describes how to successfully set up and use secure email (MetaMail) for MFPs.

Chapter 1 explains the concept of MetaMail and how it can be used with MFPs. The main benefits of the KCS solution are described. This chapter is aimed at any reader wishing to learn more about MetaMail for MFPs.

Chapter 2 describes how to effectively set up the system. Its intended readers are technicians who install and configure the system.

Chapter 3, targeted at end users, describes how to send MetaMails from an MFP device and how to access them from a user PC.

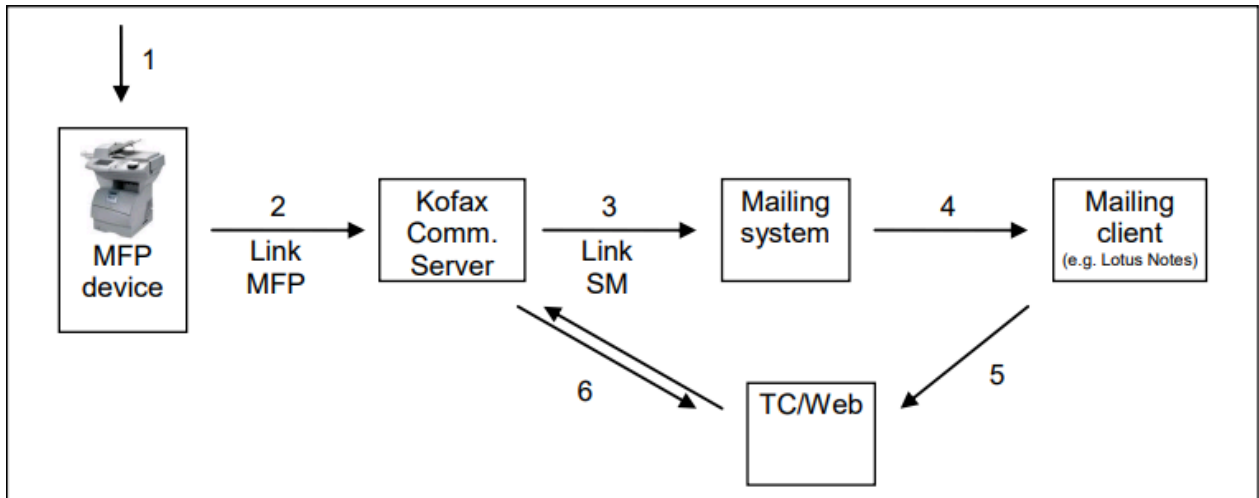
Important The Kofax Communication Server and its components formerly used the name TOPCALL. Some screen shots and texts in this manual may still use the former name.

System Overview

Most current multi-function peripherals (MFP) can scan documents and send them e.g. in PDF format to an email address.

MetaMail is a solution for secure transmission of information via email. The concept of MetaMail means that the actual content of a message remains on the KCS server while only a small reference (a URL) is transferred between the KCS system and third-party mail environments. An email with a URL is much shorter than an average email containing a scanned PDF attachment.

The following figure gives an overview of the MetaMail solution.



1. User scans a document on the MFP device and sends it to a chosen email address.
2. TC/LINK-MFP retrieves the scanned document from the MFP device and delivers it to the KCS server where it is stored.
3. TC/LINK-SM using TCAt2Url replaces the email attachment containing the scanned document with a URL in the email.
4. The modified email message arrives in the user's mail box.
5. By clicking on the URL, TC/Web opens. Depending on the settings, the user might be required to log in.
6. TC/Web connects to the KCS server and displays the message with its full content as it is stored on the KCS server.

Benefits

Businesses can significantly benefit from sending MetaMails from MFP devices:

- Secure transmission of scanned content
- Cost-effective storage at a central location
- Much less load for the mailing system (only a URL is transmitted instead of a potentially large PDF attachment)
- Traceability (it is possible to trace when a user accesses the email)

Chapter 2

Administration Section

Configuration

To send and receive MetaMail from MFP devices, the following components must be properly installed and configured:

- KCS Server Package 7.70.00 or higher
- KCS Link Package 2.22.00 or higher
- TCfW Communication Server Client version 5.27.00 or higher (necessary for administration of MFP profiles on TCOSS)
- KCS IP Printer (to print delivery/non-delivery notifications)
- An MFP supporting SMTP (with the scan-to-email function)
- TC/LINK-MFP
- TC/LINK-SM
- TC/Web Server
- eCopy (optional)

MFP

The MFP device must be able to send scanned documents via email.

The TC/LINK-MFP must be set as the SMTP server for sending emails. This is usually configured via proprietary MFP web interfaces.

The series of vendor-specific KCS MFP Integration manuals contains detailed instructions on how to configure MFP devices.

TC/LINK-MFP

The TC/LINK-MFP Technical Manual describes how to install and set up TC/LINK-MFP.

TC/LINK-MFP automatically creates a user profile for each connected MFP device. However, it is necessary to enable MetaMail for this user profile. This can be done in the Rights tab of the User Profile in TCfW – make sure that the check box “Meta-Mail” is checked. This ensures that all emails sent from the MFP device will be sent as MetaMail.

Alternatively, it is possible to enable MetaMail for a particular user only. In this case, MetaMail must be disabled in the MFP profile, but it must be enabled in the profile of the user.

When sending secure emails via eCopy, target users automatically receive MetaMails, irrespective of their user profile configuration. Select conventional email instead of secure email to deliver email with scanned contents attached.

TC/LINK-SM with TCAt2Url

TCAt2Url removes the content of a message and replaces it by a URL. The module lets you configure which types of message contents should be removed. Clearly, “removed” means that the message content is only removed from the message which is sent into the local mail system. On the KCS server the whole message remains without any changes and waits for being opened by TC/Web via the URL.

During installation of TC/LINK-SM, make sure to select the check box „Support MetaMail“. This will install an additional DLL file, TCAt2Url.dll, which is responsible of converting conventional emails into MetaMails.

- First, select “Configure Advanced Features”.

The screenshot shows a dialog box titled "TC/LINK-SM - BASIC parameters for ALL selected applications". The dialog contains the following fields and options:

- TCOSS Server type:** Tandem (alternative path) (dropdown)
- Current TCOSS Version:** TCOSS >= 7.20 (dropdown)
- TCTI transport type:** RPC (dropdown)
- Linktype to (primary) TCOSS server:** TCP/IP (dropdown)
- Name of (primary) TCOSS server:** TQA-PRISRV (text input)
- TCOSS Codepage:** TCOSS CODEPAGE 0 (0) (dropdown)
- PC Codepage:** LATIN 1 (850) (dropdown)
- Configure Advanced Features**
- Buttons:** OK and Cancel

- Then, select the check box “Support MetaMail”.

TC/LINK-SM - ADVANCED link specific parameters

Enter or modify the parameters now

Link Queue (without format character)

Default Graphic Format

Image formats polled by TC/LINK-SM

Poll Cycle (seconds)

Set Entry AT NEXT NODE

Enable Document Converter (TDCD)

Support MetaMail

Create dependencies on TCOSS server

Create dependencies on mail server (if supported)

- To disable MetaMail support, clear registry value *General\ExitDll* and set registry value *Topcall\FetchSingleSendOrder* to 0.
- The installation and configuration of TCA2Url is described in the *TC/MetaMail Configuration Manual*.

TC/Web

- The minimum required version of TC/Web for TC/MetaMail is 3.03.00, the minimum recommended version is 3.03.04.
- Set up TC/Web server as described in the “TC/Web Installation and Configuration Manual”.
- Set up Internet Information Server (Microsoft IIS), also described in the above manual.
- To access MetaMail messages from outside the company, TC/Web server must be installed in front of firewall.

User Rights

- A user who wants to access the MetaMail link must have rights to see the inbox. Typically, users scan documents to their own inboxes. However, if they send MetaMail to another person, that person must have the right to view the originator’s inbox.
- A user must have the right to read and write user profiles for the TC/Web.

Super User

There are several possibilities how users authenticate when accessing MetaMail in TC/Web interface:

- Using their normal login and password
- No authentication is required, using the Autologon feature of TC/Web (see chapter [TC/Web Registry Settings, Autologon](#))
- No authentication is required, using the super user authentication of TC/Web

To enable super user authentication for TC/Web, the *SuperUser* and *SuperInternal* registry keys of TC/Web must be configured.

The super user must exist on KCS and must have a valid KCS user profile. The super user needs also TC/Web display rights in order to retrieve mails. Additionally, the following rights are necessary:

The screenshot shows a dialog box titled "User Profile - secure2date" with several tabs: "Queue Length/Age/Pages alerting", "Queue Length/Age/Pages logging", "TC/WEB", and "TC/WEB Identity Rights". The "TC/WEB" tab is selected, and the "Rights" sub-tab is active. The dialog is divided into several sections:

- Read/Write permissions:** A list of folders and address books with checkboxes for "Read" and "Write" access. "FIS Folder", "Message Folder", "System Folder", "System Address Book", "User Address Book", "All Priv. Address Books", "Group Address Book", "Group User Profiles", and "System User Profiles" are all checked for both read and write.
- FIS prefix:** A text input field.
- Service permissions:** A list of services with checkboxes. "Meta-Mail" is checked, while "Tech user", "Server", "Services", "Registration/licence", "Change sender", and "Reporting" are unchecked. "LAN login", "Terminate incoming", "Change cost center", "Extented folder view", and "Preferences" are also checked.
- Group members and All users permissions:** A table with columns for "Group members" (List, Correct, Open) and "All users" (List, Correct, Open).

	List	Correct	Open	List	Correct	Open
Inbox	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Outbox	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Message Folder	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>
- Enter number directly:** A checkbox for "Always" is checked, and "Correct" is unchecked.
- Restricted use of services:** A checkbox is unchecked.

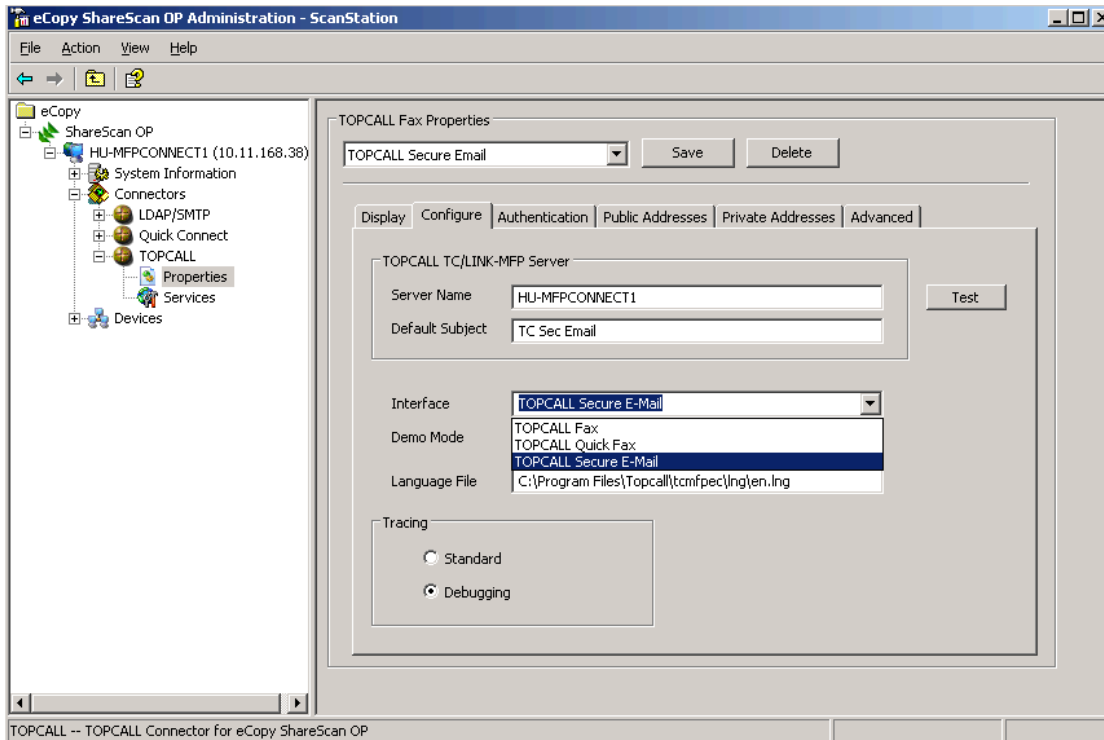
At the bottom of the dialog are three buttons: "OK", "Save", and "Cancel".

eCopy

eCopy ShareScan OP is a third-party paper document capture and distribution system. It can be connected to KCS mail infrastructure. Properly configured, it is capable of sending MetaMail.

Instructions for integrating eCopy ShareScan OP with KCS system can be found in the “Connector for eCopy ShareScan OP” technical manual.

- In the eCopy ShareScan OP Administration interface, under Connectors | TOPCALL | Properties, in the Configure tab, “TOPCALL Secure E-Mail” must be selected as Interface.



Licenses

The following licenses are necessary for this solution:

- TC/Java license for TC/Web
- TC/LINK-MFP
- TC/LINK-SM
- TC/MetaMail
- TC/COSS
- TCfW
- eCopy (optional)

Important Registry Settings

This section describes the important registry settings.

TCAt2Url Registry Settings

After the first startup of a link with TCAt2Url.dll configured as exit DLL, a new registry sub-key of the name TCAt2Url is created below the key of the link instance (HKEY_LOCAL_MACHINE\Software\TOPCALL\TCLINKxy\TCAt2Url). It consists of the following keys.

Registry key	Description	Type	Default
<i>HTTPAddress</i> (1)	The first static part of the URL that is written to the messages. Example: "http://hostname/TC/Web/Login.asp"	STRING	""
<i>TraceLevel</i>	Level of tracing. See separate section for description.	DWORD	10
<i>RemoveDocClass</i> (2)	This binary field defines what kind of message class is removed: 0x04 Fax-image 0x08 Binary 0x10 Voice For removing a combination of message classes, you have to add these values.	DWORD	0x04
<i>RemoveMode</i>	Defines how shall be removed if there are different kinds of attachments in a message: 1 – If the message consists of at least one attachment type as defined in <i>RemoveDocClass</i> , all attachments are removed and the URL is inserted. 2 – Only if all attachment types of the message are also defined in <i>RemoveDocClass</i> , the attachments are removed and the URL is inserted.	DWORD	1
<i>RemoveText</i>	0 – Text is not removed; the URL is put after the text block. 1 – Text is removed as well (independent of <i>RemoveMode</i> and <i>RemoveDocClass</i>).	DWORD	0
<i>AlwaysInsertURL</i>	0 – The URL will only be inserted if there is something removed. 1 – The URL will always be inserted, even if nothing is removed. That is necessary if escalation module is used and messages are not terminated automatically.	DWORD	0
<i>PreURLText</i>	The text that is put before the URL if attachments are removed and the URL is inserted instead.	STRING	"Use the following link to view the attachments of the message:"
<i>PreURLTextForTermination</i>	This text is put before the URL if <i>AlwaysInsertURL</i> is configured and if in fact no attachments have been removed. This is necessary if the escalation module is used and messages are not terminated automatically.	STRING	"It is necessary to click on the following link to terminate the message:"

Registry key	Description	Type	Default
<i>AutoPrint</i>	Auto print active (1) or inactive (0). For using AutoPrint you need the Professional services module TC/AutoPrint and a minimum version of TCA2Url of 1.02.00	DWORD	0
<i>EnCryptURL</i>	URL Encryption active (1) or inactive(0)	DWORD	0
<i>SearchInOutbox</i> (3)	Only event-generated messages are handled (0), or the content is replaced with the URL also for messages in outbox.	DWORD	0

The following registry keys have to be changed from the default values:

- (1) The key *HTTPAddress* has to be set in order to write the correct URL to the message.
- (2) Set the *RemoveDocClass* registry key to "0x08". This will assure that any message containing any kind of image or attachment will not consume memory on your mail server.
- (3) The *SearchInOutbox* registry key must be set to "1".

TC/Web Registry Settings

The following TC/Web-related registry keys are related for MetaMail. All can be found in the path: "HKEY_LOCAL_MACHINE\SOFTWARE\Topcall\TCWeb".

Registry key	Description	Type	Default
<i>MetamailClient</i>	Set to 1 when TC/Web is to be used as a MetaMail client.	DWORD	0
<i>MetamailHideButtons</i>	1 ... The buttons in header of MetaMail windows are not displayed. 0 ... Buttons are displayed.	DWORD	0
<i>MetamailLatestDelTime</i> (1)	If MetaMail is configured to <i>SearchInOutBox</i> in TCA2Url, this registry value can be used to define the time range (in seconds) in which the MetaMail message is searched.	DWORD	0
<i>MetamailSuperuserHideActionButtons</i>	If set to 1, and a user is logged in as <i>SuperUser</i> for MetaMail, the Reply, Reply All and Forward buttons will not be available in the MetaMail message header.	DWORD	1
<i>SuperInternal</i> (2)	Password of user specified in key <i>SuperUser</i>	STRING	[blank]
<i>SuperUser</i>	User name of user on KCS system with rights to read and write all user profiles	STRING	[blank]
<i>TimeoutSessionMetamail</i> (3)	Default time of inactivity after which the user must re-login after opening a MetaMail message (minutes)	DWORD	5 (min=1, max=1440)

Registry key	Description	Type	Default
<i>Autologon</i>	0 ...no Autologon 1... Users can logon automatically (Users must have LAN login right granted in user profile)	DWORD	0

(1) The registry key *MetamailLatestDelTime* sets the time range in which the MetaMail message should be searched. It is necessary when MetaMail is configured to *SearchInOutBox* (see *TC/At2Url Manual*). (When a message is sent out, and if TC/Web is configured to wait for a read notification, TIME_ACTION will be set as soon as the read notification has arrived. Due to this fact, a possibility to define the time range is needed.) If set to 0, the time range definition will be disabled and the standard time range, 60 seconds, will be used.

(2) The registry keys *SuperInternal* and *SuperUser* are needed if automatic login to TC/Web without identification is used (no user/password is needed for login).

(3) For security reasons, the registry key *TimeoutSessionMetamail* can be used to set a shorter timeout value. It is only used if the user opens a MetaMail message. A short timeout is acceptable because a user typically acts on a single message in a short time frame. A short timeout is useful here because it is likely that many people could be accessing TC/Web at the same time on a MetaMail system.

Note After changing any registry key, it is necessary to restart IIS to make the changes effective. You can restart IIS e.g. by launching the IISReset command-line utility (Start | Run: "iisreset").

See "TC/Web Installation and Configuration Manual" for additional information.

Chapter 3

User Section

This section describes how to use MetaMails.

Sending MetaMails

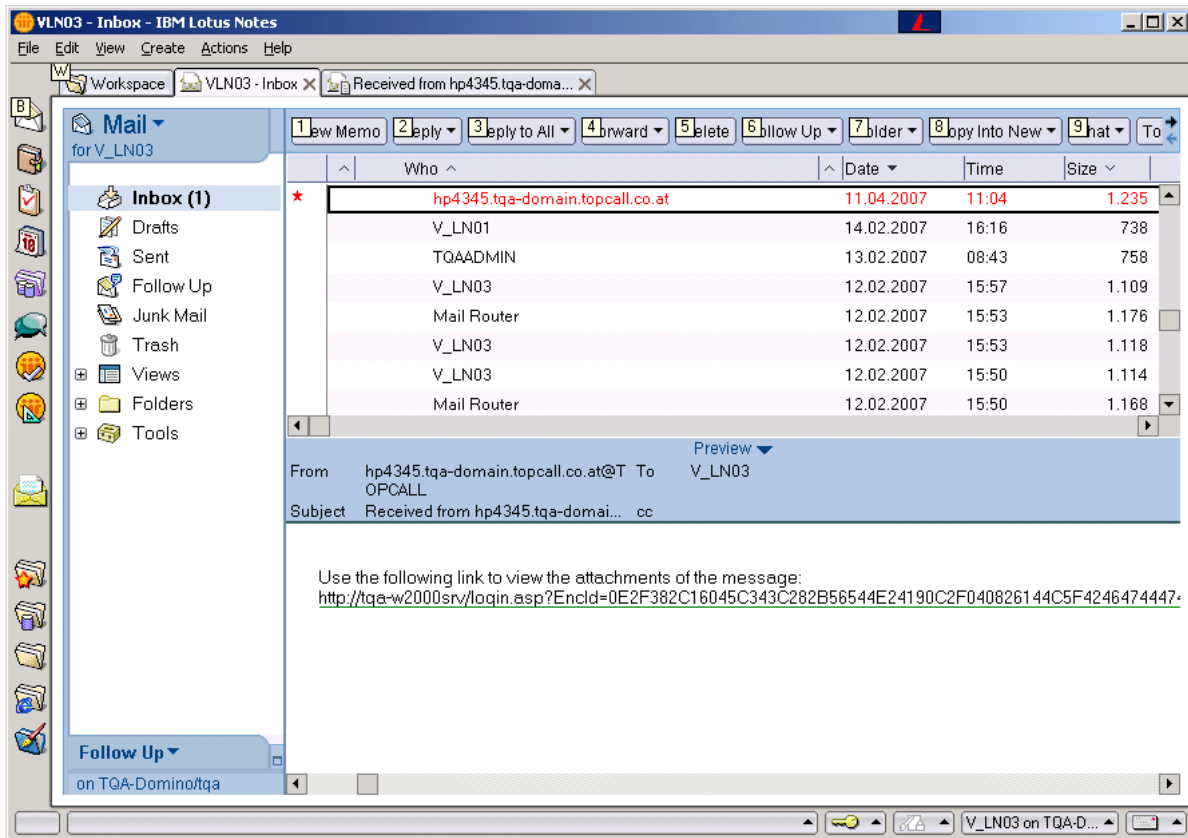
From users' perspective, scanning to MetaMail from an MFP device is no different from scanning to conventional email or fax. Users must specify a destination email address and start scanning.

Additionally, it is possible to specify the originator in the address. This keeps addressing simple and enables users to keep track of their messages via their mail system.

When using eCopy, users must first select a service to use, in this case, Secure Email.

Displaying MetaMails

Instead of the entire scanned document attached to an email, the user receives a short email with a hyperlink to his mailbox.

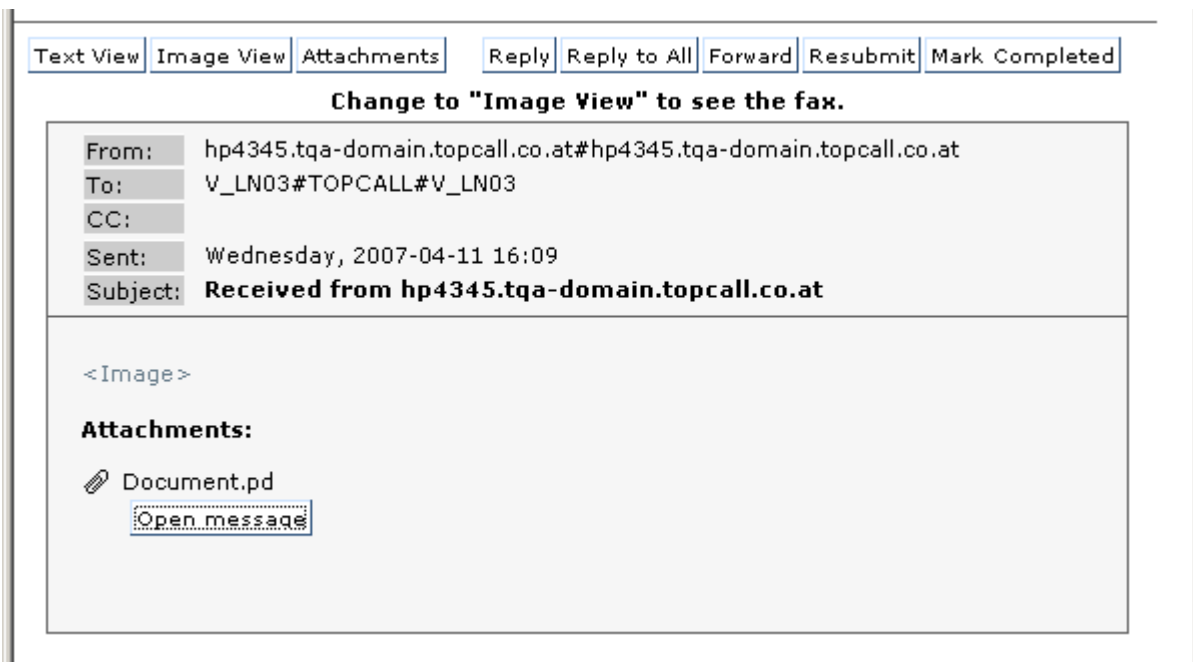


Clicking the link automatically opens TC/Web interface and displays the full message content including the scanned attachment.

Optionally, it is possible to enable authorization before being able to view the content.



The following figure shows a sample message sent from an MFP.



The scanned document in PDF format is attached to the email.

Text View Image View Attachments Reply Reply to All Forward Resubmit Mark Completed

Change to "Text View" to see the message attachments.

33%

CORE

E. NIGORAU, MD
 Y. CHEN
 D. COOPER

C. MAGOL, MD
 J. BARRETT
 OTHER

PRIVATE OTHER
 WITH CALUCS

HOSPITAL:

MEMORIAL MILLER
 OTHER

1234567891

Description	CPT	Month	Year	Charge
CONSTRUCTION				
Initial, Comprehensive / High Complex (80)	99205			
Initial, Comprehensive / Mid Complex (80)	99254			
Initial, Detailed / Low Complex (80)	99253			
Initial, Expanded / Straightforward (80)	99252			
PHYSICIAN SERVICES				
Initial, Comprehensive / High Complex (70)	99123			
Initial, Comprehensive / Mid Complex (80)	99252			
Initial, Comprehensive / Straightforward (80)	99251			
Subsequent, Detailed / High Complex (95)	99293			
Subsequent, Extended / Mid Complex (25)	99292			
Subsequent, Focused / Low Complex (15)	99291			
Discharge Day Management	99296			
PHYSICIAN SERVICES				
Prolonged Attendance, Specify # of hours	99150-99151			
Medical Team Conference (80)	99282			
Response Between 10pm - 8am	99282			
Response After Office Hours	99280			
PHYSICIAN SERVICES				
Interpretation of ABG's / CGO's, Specify #	92003-92004			
Pulse Oximetry	94780			
Inhalation Treatment	94810			
Cont. Aerosol Treatment (30-seconds, 30-seconds, etc.)	94821-94822			

Applet TiffanyApplet started

Internet

Forwarding MetaMails

Only those users who have the right to open the Inbox of the original recipient of a message on the KCS server can access that message via a URL with TC/Web. Therefore, forwarding a message from the mail client (Lotus Notes, ...) is a good idea only if the recipient has the right to open your Inbox on the KCS server.

Normally, the recipient does not have this right. In that case, forwarding a message containing a URL is not practicable and the recipient will not be able to resolve that URL with TC/Web. Use TC/Web for forwarding the message.