

Kofax TotalAgility Installation Guide

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KOFAX

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Table of Contents

Preface.....	4
Training.....	4
Getting help with Kofax products.....	4
Chapter 1: Installation planning.....	6
Configure https communication.....	6
VRS Elite.....	6
Chapter 2: TotalAgility Tenant Management installation.....	8
Perform a silent installation.....	8
Perform a standard installation.....	9
Log on to TotalAgility Tenant Management.....	11
Encrypt and decrypt Web.Config.....	11
Anti-Cross Site Request Forgery (CSRF) measures.....	11
Anti-Cross Site Request Forgery (CSRF) tokens.....	12
Enable Host prefix for cookies.....	12
Chapter 3: Launch TotalAgility Tenant Management.....	14
Activate the license.....	14
Chapter 4: VRS Elite installation.....	15
VRS Elite installation.....	15
Configure the VRS License Server.....	15
Use the Kofax TotalAgility license for VRS Elite.....	15
Chapter 5: Uninstall TotalAgility Tenant Management.....	17
Uninstall using the wizard.....	17
Uninstall in silent mode.....	17
Chapter 6: Upgrade process.....	18
Chapter 7: Troubleshooting.....	19
Installation failure in IPv6 environment.....	19
Downloading software updates.....	19

Preface

This guide includes instructions for installing Kofax TotalAgility Tenant Management.

Read this guide completely before using the software.

Training


Kofax offers both classroom and online training to help you make the most of your product. To learn more about training courses and schedules, visit the [Kofax Education Portal](#) on the Kofax website.

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

Installation planning

This chapter provides information about hardware and system requirements, and recommendations for installing and using Kofax TotalAgility Tenant Management System.

For information on supported operating systems and other system requirements, and if your solution includes multiple Kofax products, refer to the *Kofax TotalAgility Technical Specifications* document on the Kofax TotalAgility [Product Documentation](#) site. The document is updated regularly, and we recommend that you review it carefully to ensure success with your TotalAgility product.

For prerequisites, see the *Kofax TotalAgility Prerequisites Guide* available on the [Kofax Fulfilment site](#).

Configure https communication

Enable SSL (Secure Sockets Layer) communication for the Kofax TotalAgility web layer.

To enable SSL for Kofax TotalAgility Tenant Management Application:

1. Open **Internet Information Services (IIS) Manager**.
2. On the Features View, double-click **Server Certificates**.
3. Under Actions, click **Create Self-Signed Certificate**.
The Create Self-Signed Certificate window appears.
4. Enter the name for the certificate and click **OK**.
5. Right-click the **Default Web Site** and click **Edit Bindings**.
6. Click **Add**.
 - a. On the Type list, select **HTTPS**.
 - b. On the SSL certificate list, select the certificate.
 - c. Click **OK**.

VRS Elite

Factors such as security considerations influence a customer to perform image processing on the server. Depending on your environment, documents, and preferences, there may be times when it is preferable to perform image processing operations on a scan station instead of the TotalAgility server. By default, TotalAgility performs image processing on the server. VRS Elite performs image processing on the scan station.

TotalAgility only supports TWAIN scanners. VRS Elite provides additional options to clean the image for TotalAgility scan clients using a VRS-certified scanner.

When you purchase TotalAgility, VRS Elite licensing is included. However, you must configure VRS to use that license.

For tenant deployments, the administrator must configure VRS to use a TotalAgility license proxy. For backup licensing, the administrator can install a local backup license server.

The following four components are involved:

1. **VRS Client:** Performs the VRS tasks.
2. **VRS Server:** Handles license activation for Kofax VRS licenses which differ from the TotalAgility licenses. The VRS Client connects to the VRS Server for its licensing information.
3. **Kofax TotalAgility License Proxy:** Contacts the TotalAgility License server periodically for caching the results when the licensing component is disconnected from the license server on the network.
4. **Kofax TotalAgility License Server:** Manages all of the licensing components of the TotalAgility system, such as concurrent users, volume page count and VRS (with the exception of Analytics, which uses its own license).

Chapter 2

TotalAgility Tenant Management installation

This chapter describes two methods for installing TotalAgility Tenant Management:

- [Silent installation](#) for multiple servers that use the same configuration.
- [Interactive installation](#) using the standard installer wizard.

Perform a silent installation

Use the TotalAgility Tenant Management silent installation to install TotalAgility Tenant Management automatically from a command line or a batch file. After you edit the silent install file, the TotalAgility Tenant Management installation proceeds without any further user interaction and SSL is automatically set to True.

i The user who will run TotalAgility Tenant Management must have "Log on as Service" rights.

1. On the installation media, navigate to the `TotalAgility\OnPremiseMultiTenancyInstall\OnPremiseMultiTenancyInstall\TenantManagementInstall` folder and open the `SilentInstallConfig.xml` using a text editor.
2. In the `SilentInstallConfig.xml` file, update the following parameters:

Parameter	Default Value	Description
SerialNumber	Not Applicable	Not Applicable
ProductCode	Not Applicable	Not Applicable
InstallDirectory	C:\Program Files\Kofax \TotalAgilityTenantManagement	Specify the Kofax TotalAgility destination directory.
MasterTenants	MasterTenants	Enter the MasterTenants database name.
WindowsAuthentication	true	Set to true to use windows credentials for logging in.
NewDatabase	false	Set to true to create a new database.
UserName	empty (false)	Enter the name of the user who will run TotalAgility Tenant Management. i If the service account name ends with a \$ (dollar), do not specify the password.

Parameter	Default Value	Description
Password	empty (false)	Enter the password for the user.
RunAsSystemAccount	false	If set to true, the IIS AppPool and Kofax TotalAgility services run as the LocalSystem account.
ValidOS	true	Set to true to check if the Operating System is valid.
SQLServerInstalled	true	Set to true to check if the SQL Server is installed.
SQLClientInstalled	false	Set to true to check if the SQL Client is installed.
IISInstalled	true	Set to true to check if IIS is installed.
InstallAction	Install	Accept the default.
InstallMode	Silent	Accept the default.
InstallType	Both	Select the install type. The Install Type can be ApplicationServer, WebServer, or Both.
<SiteRoot>	Default Web Site	Install TotalAgility under a custom site that uses a non-standard port other than the standard ports (80 and 443). For example, create a custom site called "testsite" under IIS using the port number 85.

3. Save and close the file.
4. Navigate to the root directory of the Setup.exe file.
5. Run `Setup.exe /Silent`.

The Tenant Management application is installed and the system generates a log file which reports any errors.

Perform a standard installation

You must have an Administrator account to install TotalAgility.

1. Ensure that the user who will run TotalAgility Tenant Management has "Log on as Service" rights.
2. On the installation media, navigate to `TotalAgility\OnPremiseMultiTenancyInstall\OnPremiseMultiTenancyInstall\TenantManagementInstall` and run one of the following commands:
 - If UAC (User Account Control) is enabled, right-click **Setup.exe** and select **Run as administrator**.
 - If UAC is not enabled, run **Setup.exe**.

The system starts the **TotalAgility Tenant Management** installation.

3. Click **Next**.

The **Kofax Inc. Software License Agreement** window opens.

4. Accept the terms in the License Agreement and click **Next**.

The **Software Checks** window opens. The system detects and displays a list of required software required for installation.

5. Review the **Detected Software** list and proceed as follows:

- If your system does not have all the required software, click **Cancel** to close the installer. Install the missing software, then repeat this installation.
- If your system has all the required software, click **Next**.

The **Destination** window opens.

6. Use the default installation folder or click **Browse** to select a different path. Then click **Next**.

The **Email Configuration** window opens.

7. Enter the details for the **SMTP Configuration**.

- a. **Host Name**, such as smtp.office.com
- b. **Port Number**, such as 587
- c. **User Name**, such as kofax@kofaxindiapvtlimited.com
- d. **Password**
- e. **From Address**: Email address from where the email is sent. For example, kofax@kofaxindiapvtlimited.com
- f. **Bcc**: Email addresses of the users who need to receive the copy of the email.
- g. Select **Enable SSL** to use HTTPS communication.
- h. Select **Enable support for international characters** to support using international characters in the email address.

An email is triggered from the configured SMTP server when the tenant is created.

8. Click **Next**.

The **Credentials** window opens.

9. Enter the credentials for the user who will run TotalAgility Tenant Management.

If you run TotalAgility Tenant Management under a System Account, you must have a trusted account to interact with databases. Provide the SQL credentials with SYSADMIN permissions.

i If the service account name ends with a \$ (dollar), do not specify the password.

10. On the **Root Website to host TotalAgility Application** list, select the website to host the TotalAgility application. By default, the **Default Web Site** is selected.

i The websites added in IIS Manager appear on this list. To add a website in IIS Manager, click `Start > Run > IIS Manager > Sites > Add Web Site`.

11. To point to the Azure database, select the **Azure** check box.

12. Click **Next**.

13. Select the **Master** database name. You can either select the Azure or On-Premise database.

i On the **Database Server** list, select the database server. If Appool is running under a System account, the System displays an error. You must have a trusted account to interact with databases. Provide the SQL credentials and click **Apply these settings to all other Databases**. Click **OK**

The **DB Connection Results** window opens.

14. Click **Next**.

The **Installation Progress** window opens. The setup installs the required files, databases, and other integrated products.

15. Click **Finish**.

Your installation is now complete.

Log on to TotalAgility Tenant Management

After you install TotalAgility Tenant Management application, a shortcut to Tenant Management appears under **All Programs**.

1. Navigate to **Start >All Programs Kofax TotalAgility Tenant Management TenantAdmin**. It opens the TotalAgility Tenant Management application.
2. Enter the **Username** and the **Password**.

i The default username and password is "Administrator". Please change the username and password for security reasons. See Manage Users in the *Kofax TotalAgility On-Premise Multi-Tenant* guide.

Encrypt and decrypt Web.Config

The TotalAgility tenant management Web.Config includes the DB Connection settings and sensitive information. Therefore, Kofax recommends that you encrypt this file.

1. Navigate to the location of Web.Config:

```
<Kofax Install location>\TotalAgility\TenantManagementInstall  
\Agility.Server.Web.TenantManagement
```

2. Use the Microsoft ASP.NET IIS Registration Tool (aspnet_regiis) to encrypt or decrypt any section of Web.Config. For more information, see the Microsoft website.

At a minimum, encrypt the appSettings section that includes sensitive database connection information.

Anti-Cross Site Request Forgery (CSRF) measures

Use the following anti-CSRF measures to protect the site against Cross-site Request Forgery attacks.

- [Configure the Anti-CSRF tokens](#)

- Specify the Samesite attribute with value as Strict or Lax in the <hostCookies> tag of the web.config to prevent CSRF attacks. See the Microsoft website for more information.
- [Enable Host prefix for cookies](#)

Anti-Cross Site Request Forgery (CSRF) tokens

A CSRF attack relies on a user being authenticated on a website. The attack usually comes as an email or website hyperlink on which the user clicks while still authenticated. This URL then points back to the user's website and attempts to perform a privileged action (such as add an administrator account) without the user's knowledge. In TotalAgility, the TargetHostName and TargetPortNo settings are added as Anti-CSRF tokens in the Web.config file. The TargetHostName is the fully qualified domain name of the webserver and the TargetPortNo is the website port number. When you provide for these settings, the Anti-CSRF origin and referrer validations are performed on the request URL. If the validation fails, the request will be terminated considering it as a potentially dangerous request.

You can configure the Anti-CSRF tokens in the Web.config manually or using the Configuration Utility.

Manually

1. Navigate to the installation directory for the TotalAgility server.
2. In a text editor, open Web.config from the following directory: .
 \\TotalAgilityInstall\Agility.Server.Web
 \\OnPremiseMultiTenancyInstall\Agility.Server.Web
3. Locate the following section and specify the target host name and target port number.

```
<appSettings>  
    <add key= "TargetHostName" value="<hostnamegoeshere"/>  
    <add key= "TargetPortNo" value="443"  
    </appSettings>
```

4. Save and close the configuration file.

Use the Configuration Utility

Run the Configuration utility and specify the TargetHostName and TargetPortNo settings. See the *Kofax TotalAgility Configuration Utility Guide*.

Enable Host prefix for cookies

Use the "Host Prefix for Cookies", a browser functionality which makes the cookies more secure by prefixing the TotalAgility cookie names with "__HOST-". When a cookie name starts with this flag, it triggers additional browser policy on the cookie in supporting browsers. A __Host--prefixed cookie is only accessible by the same domain it is set on, which means a subdomain can no longer overwrite the cookie value. It also makes a cookie accessible from HTTPS sites only. This protects the cookie even if an attacker uses a forged insecure site to overwrite a secure cookie.

Edit the setting manually or use the Configuration Utility for enabling or disabling the cookies security.

Perform the following steps on the Web or combined Web/Application server.

1. On the Kofax TotalAgility installation media, navigate to \\TotalAgilityInstall\\Agility.Server.Web\\OnPremiseMultiTenancyInstall\\Agility.Server.Web.
2. Open web.config in a text editor.
3. Locate the **<appSettings>** section and make sure the value of "UseHostPrefixForCookies" value="true".

```
<appSettings>  
  <add key="UseHostPrefixForCookies" value="true"/>  
</appSettings>
```

Use the Configuration Utility

Run the Configuration Utility and change the Host Prefix for Cookies setting on the Web settings tab as needed.

Chapter 3

Launch TotalAgility Tenant Management

1. Enter the following URL in the browser: `http://<TA server hostname or IP>/TenantManagementWebSite/TenantManagement/TenantLogon.html`.
2. Enter the login credentials used during installation.
TotalAgility Tenant Management is launched in the browser.

i Change the password immediately for security reasons.

3. Alternatively, click **Start > All Programs > Kofax TotalAgility Tenant Management > TenantAdmin**.

Activate the license

If you log on to TotalAgility Tenant Management and the license is not activated, the License Activation window opens.

1. In the **License Activation** window, either click **Next** to accept the default values for **License Server** and **Port Number**, or enter the new values.
2. Click **Set license server** to save the information.
3. For further instructions, see the Activate the License Server step in [Use the TotalAgility installation wizard](#).

i If you have issues activating your licence, contact Kofax support at: <http://www.Kofax.com/support/tools/>

Chapter 4

VRS Elite installation

Install VRS and configure the VRS license server.

VRS Elite installation

Use VRS in a simple VRS client and server configuration. However, for the VRS Elite software to work within a larger TotalAgility system, you must configure the scan workstations to communicate with the TotalAgility license server.

Install VRS Elite 5.1.0 server. See the *Kofax VRS Elite documentation* for more information.

i When prompted to activate the license during VRS Elite server installation, click **Cancel**, as you will be using the Kofax TotalAgility license server instead.

When you install VRS Elite, **Kofax Software VRS - TWAIN** appears in the list of scanners while scanning a document in TotalAgility. See *Kofax TotalAgility Scan Client Help* for more information.

Configure the VRS License Server

1. Click **Start > All Programs > Kofax VRS**.
2. Run **Kofax License Utility**.
3. Click **File > Select Servers**.
4. In the Select Servers window, enter valid IP addresses or server names for the Primary License Server and Backup License Server.
5. Click **OK**.

Use the Kofax TotalAgility license for VRS Elite

The Kofax TotalAgility license includes at least one VRS Elite license.

To support tenant licensing for VRS Elite, a new component replaces the VRS Elite license server in TotalAgility environments and communicates with TotalAgility for tenant-specific licensing.

Servers are linked to either Azure or On-Premise tenant deployment. In such cases, the linked server licensing needs to come from Azure.

Shared Licensing for On-Premise Linked Servers

This is the standard on-premise linked server configuration. In this scenario, the license server is deployed at a single site. The other sites share the license server deployed at one of the sites.

Shared Licensing for On-Premise Multi-Tenant Linked Servers

This scenario includes multiple sites to improve performance. The license server is deployed at one of the sites. The other sites share this existing shared license server. TotalAgility user-interactive runtime license requests are optimized.

Tenant Licensing for On-Premise Multi-Tenant with a Linked Server for One Tenant

This scenario includes a tenant using a local instance to improve performance. The license server is deployed at the main location, but the linked server must use the tenant-specific licensing.

Tenant Licensing for SaaS with a Linked Server for One Tenant

The linked server feature can be combined with SaaS deployments. This scenario includes a tenant using a local instance to improve performance.

Chapter 5

Uninstall TotalAgility Tenant Management

Uninstalling TotalAgility Tenant Management only removes the application and not the database.

Uninstall using the wizard

1. Click **Start > All Programs > Kofax TotalAgility Tenant Management >** , right-click and select **Uninstall Kofax TotalAgility Tenant Management**.
The **Uninstall** window opens.
2. Click **Next**.
The **Uninstallation Progress** window opens.
When the uninstall is complete, the **Uninstallation Complete** window opens.
The summary report lists the components, servers, applications and services uninstalled.
3. Click **Finish**.

i If there are any errors during uninstall, TotalAgility automatically creates a log file called `Kofax TotalAgilityInstallationErrorLog.txt` on your desktop. This log file contains information about the errors if any.

Uninstall in silent mode

1. Navigate to the root directory of the **Setup.exe** file.
2. Run the command `Setup.exe/Silent/U`.
The system uninstalls TotalAgility Tenant Management and automatically creates a log file on your desktop. This log file contains information about errors, if any.

Chapter 6

Upgrade process

You can upgrade TotalAgility from 7.3.0, 7.4.0, 7.5.0, 7.6.0, 7.7.0, 7.8.0 to 7.9.0. Navigate to TotalAgility Installation media and double-click **Setup.exe** and follow the upgrade instructions.

If any errors occur during upgrade, TotalAgility creates a log file called Kofax TotalAgilityInstallErrorLog.txt on your desktop. Fix the errors.

❗ To upgrade TotalAgility from any version below 7.0.2 to 7.X.0, you must first migrate to the base version 7.0.2, and then upgrade 7.0.2 to 7.X.0. See the *Kofax TotalAgilityMigration Guide*.

Chapter 7

Troubleshooting


This section describes the issues you may encounter and their resolution.

Installation failure in IPv6 environment

If SQL server is configured to listen only on IPv6 addresses on a dual-stack (IPV46), client connection attempts using IPv4 addresses will fail. These failures may take longer than the default TCP timeout established during connection handshakes. Even though the subsequent IPv6 connection may succeed immediately, the connection may still fail.

To resolve this issue, disable IPv4 in the SQL Server Configuration Manager.

1. Start **SQL Server Configuration Manager**.
2. Open the Properties for the TotalAgility server instance TCP/IP protocol.
3. Set **Listen All** to **No**.

 This setting allows fine control over which interfaces the TotalAgility server SQL instance will listen for connections.

4. Click the **IP Address** tab.
5. Set **Enabled** to **No** for all entries except for ::1 which is the IPv6 local host address.
6. Click **OK** to commit changes and click **OK** at the service restart dialog.
7. Restart the SQL Server (<TAServerInstance>) service where TAServerInstance is the actual instance used by TotalAgility (for example, Kofax TotalAgility).

Downloading software updates

When downloading an installation package or a service pack from the **ftp.kofax.com** site, ensure that this site is added as a trusted site, otherwise the downloaded file may get corrupted.