

# Kofax TotalAgility

Administrator's Guide for Kyocera MFPs

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The logo for KOFAX, consisting of the word "KOFAX" in a bold, blue, sans-serif font.

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# Preface

This guide describes how to install the Kofax TotalAgility front panel software, which is client software that resides on the MFP. After performing this procedure, you can create and update device profiles with shortcuts from Devices whenever needed. When the MFP contacts Kofax TotalAgility, the updated device profiles are retrieved and display on the MFP.

Before continuing, see the Technical Specifications document, which is available on the Kofax website at [www.kofax.com](http://www.kofax.com), for supported models and application versions.

**Important** If you are upgrading Kofax TotalAgility, you must upgrade the client software on all MFPs to implement the latest security features.

## Related documentation

The product documentation set for Kofax TotalAgility is available at the following location.

[https://docshield.kofax.com/Portal/Products/en\\_US/KTA/7.8.0-dpm5ap0jk8/KTA.htm](https://docshield.kofax.com/Portal/Products/en_US/KTA/7.8.0-dpm5ap0jk8/KTA.htm)

In addition to this guide, Kofax TotalAgility includes the following documentation:

### ***Kofax TotalAgility Installation Guide***

The *Kofax TotalAgility Installation Guide* provides installation instructions and other information that helps you successfully set up Kofax TotalAgility.

### ***Release Notes***

Release notes provides late-breaking product information that may not be included in other Kofax TotalAgility documentation. The release notes are available for viewing or downloading from the Kofax website.

## Training

Kofax offers both classroom and computer-based training to help you make the most of your Kofax TotalAgility solution. Visit the Kofax website at [www.kofax.com](http://www.kofax.com) for details about the available training options and schedules.

## 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, go to the [Kofax website](#) and select **Support** on the home page.

**Note** 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.
- Access to the Kofax Customer Portal (for eligible customers).  
Click the **Customer Support** link at the top of the page, and then click **Log in to the Customer Portal**.
- Access to the Kofax Partner Portal (for eligible partners).  
Click the **Partner Support** link at the top of the page, and then click **Log in to the Partner Portal**.
- Access to Kofax support commitments, lifecycle policies, electronic fulfillment details, and self-service tools.  
Scroll to the **General Support** section, click **Support Details**, and then select the appropriate tab.

## Chapter 1

# Features

The following Kofax TotalAgility features are available with the Kyocera MFP. See the Help for Devices for more information.

- Management through Devices in the Kofax TotalAgility Designer

MFPs are able to self-register with Devices and automatically activate licenses. (This feature is optional.) You can also manually activate, deactivate, or remove MFPs whenever needed. In Devices, you can open the Web page for the MFP if Kofax TotalAgility can communicate over the network with the MFP.

- Client software on the MFP

When the client software is installed, a button is added to the front panel of the MFP to provide access to Kofax TotalAgility features. The appearance of the front panel depends on the MFP model.

- Log on

This feature enables you to log on to the MFP as a Kofax TotalAgility user. Logging on may provide additional options.

- Shortcuts

This feature facilitates the sending of documents. In Kofax TotalAgility Designer, use Device Create New Job to create forms that appear as shortcut buttons on the MFP front panel.

- Scan history

At the MFP, you can press the Scan History button on the main menu to view the scan history. If you are logged on, the history shows transactions you sent to Kofax TotalAgility from any connected device. If you are not logged on, the history shows transactions sent from all anonymous users on the device, as well as any transactions that are waiting to be sent to the server from the device.

Jobs can be cancelled, depending on their status. After the cancellation is complete, the job remains in the log and has a Deleted status.

Status	Description
Pending*	Submitted to the configured FTP or WebDAV folder. or Ready to start scanning.
Sending*	Sending or uploading the job from the configured FTP or WebDAV folder to the server.
Queued	Submitted and in the server processing queue.
Completed	Successfully sent to destination.
Retrying*	The job is being resent after it failed in a previous attempt. This message indicates the number of the retry attempt.
Retry Pending*	The job failed to be sent and another attempt will be made. This message indicates the number of the retry attempt.

Status	Description
Canceling	The job is being cancelled by user request.
Pending Cancellation	A request was made by the user to cancel the job.
Error	Failed to send the job to the server.
Deleted	The job was cancelled by the user.
* Can be cancelled manually from the Scan History window if the user has the FullControl access type or KTA permission in Devices. The number of attempts and the behavior for handling a failed job is configured in Devices. If the failed job is retried or cancelled, the device processes it after finishing all other jobs pending for process.	

- Display confirmation messages

You can enable confirmation messages to be sent from Kofax TotalAgility to this MFP so that users can see status information about their transactions. Messages appear on the MFP front panel when each scanned transaction reaches the server, or if a problem occurs. See the Devices Help for instructions on setting up confirmation messages.

- Language support

At the MFP front panel, you can specify the language. If the language specified is not supported by Kofax TotalAgility, English is used by default.

**Note** If you change the language, restart the Kofax client software in order for the change to take effect.

- Form fields

You can enter values for form fields at the MFP. When you define forms in Devices, you can enter default values into fields for these shortcuts. The data is also validated for an appropriate type and length. You can also customize the validation and field lookup options.

- Customized validation and lookup options

You can customize validation and a variety of field lookup options for forms in the Kofax TotalAgility Designer. For more information, see Kofax TotalAgility Help.

- Device logging

Log messages from the device are stored in the Kofax TotalAgility database. Download the log from Devices by going to the General tab for the device and clicking Download Log.

- Scanned page count

This feature displays the number of pages that have been scanned. When you add pages to a document, the front panel displays the number of newly scanned pages and the total number of pages in the document.

- Help

Help is available at the MFP touch screen. Users can press the question mark or Help button on the touch screen to view information about the screen.

## Chapter 2

# System requirements

The primary source of information about supported devices and other Kofax TotalAgility requirements is the Technical Specifications, which is available on the Kofax website at <http://www.kofax.com>.

Before installing the Kofax TotalAgility client software for the Kyocera MFP, also do the following:

- Install Kofax TotalAgility.
- Download the Kyocera client software from Devices.
- Make sure you have sufficient licenses to use your MFPs.
- Make sure that you use a supported Kyocera MFP that has HyPAS installed. See the Kofax TotalAgility Support pages on the Kofax website for supported MFPs.
- Verify that the device has data storage. If it does not have a hard drive, insert either an SD or Compact Flash card for flash storage.
- When using device authentication with Kofax, verify that the timeout setting is set to enable the device to prepare the largest likely scanned documents for sending to Kofax. If the device logs out before finishing, the scan job is lost.

## Support for single sign on

Kofax TotalAgility supports single sign on for users who are also registered users on the Kyocera MFP. Users who log on to the MFP are also logged on automatically to Kofax TotalAgility.

To use single sign on, the user name for the MFP must exactly match the user name for logging on to Kofax TotalAgility. User names for a Kyocera MFP are set using the Login User Name property of the device. See the Kyocera documentation for instructions.

## Network and server troubleshooting

If the MFP is disconnected from the network, or if Kofax TotalAgility is down, the current scan job can continue, and the images are saved on the MFP hard drive. Until the server connection is restored, the client cannot be used. When the connection to Kofax TotalAgility is restored, the documents on the MFP hard drive are sent to the specified destinations and the client can resume normal operations.



## Chapter 3

# Installing the Kofax client software

Install the Kofax client software by using either of the following methods:

- Use the Kyocera Net Viewer to install the software from a computer connected to the device.
- Install the software directly on the device by copying the installation package file to a USB drive and running the installation. Format the USB drive before copying the installation package file. That file needs to be the only file on the drive.

When the installation is complete, the Kofax button appears on the front panel. Tap the button to start the client software.

For more information about installing software on a Kyocera MFP, refer to the documentation provided with your device.

**Important** If the MFP already has the Kofax client software, uninstall it before installing new client software. See [Uninstalling the Kofax client software](#) .

## Installing with Kyocera Net Viewer

To install the Kofax client software, use Kyocera Net Viewer version 5 or any later version that supports the installation of HyPAS Java applications. When you install Kyocera Net Viewer, select the option to install device management components. You also need to set the following options on the device to support remote installation. (See the Kyocera documentation for more information.)

- SNMPv3 Setting
  - SNMPv3: On
  - Authentication: On
  - Hash: MD5
  - Privacy: On
  - Encryption: DES
  - Read/Write User Name: The name of the user and password are set.
- SSL Setting
  - SSL: On
- IPP over SSL Setting
  - IPP over SSL: On

For more information about using Kyocera Net Viewer, see the help provided with the application.

1. Start the Devices and log on as a user with administrator rights.

2. Download and save the Kyocera client software as shown in the Devices Help.  
The downloaded client software should contain the installation package files.
3. Start Kyocera Net Viewer.
4. If the device where you want to install the client software has not already been discovered, add it.
5. Right-click the device and select **Advanced > Authentication Settings**.
6. When prompted, enter the user name and password for the device administrator.
7. Leave **Use local authentication** unselected and click **OK**.
8. Right-click the device and select **Advanced > Manage applications**.  
The Manage Applications window appears.
9. Select **Install application** and select the option **Activate application after installation**. Click **Next**.
10. Select the installation package as follows.
  - a. Click **Browse**.
  - b. In the Open window, navigate to the folder where you downloaded the Kyocera client software.
  - c. Select the appropriate package file for your type of device:
    - KofaxKyoceraClient.pkg: Use this file for JavaME platform and JavaSE 8 platform devices.
    - KofaxKyoceraClient\_SE.pkg: Use this file for JavaSE 8 platform devices only.
  - d. Click **Open**.  
The Open window closes, and the name of the package file appears in the File field.
  - e. Click **Next**.  
The Confirmation screen shows information about the package file you are installing.
11. Select **Activate without a license key** and click **Finish**.  
The front panel software is installed.
12. Click **Close** to close the **Managed Applications** window.

## Installing directly on the device

1. Start Devices and log on as a user with administrator rights.
2. Download and save the Kyocera client software as shown in the Devices Help.  
The downloaded client software should contain the installation package files.
3. Copy the appropriate installation package file to a USB drive:
  - KofaxKyoceraClient.pkg: Use this file for JavaME platform and JavaSE 8 platform devices.
  - KofaxKyoceraClient\_SE.pkg: Use this file for JavaSE 8 platform devices only.
4. Insert the USB drive by doing the following:
  - a. Turn off the MFP.  
Turning off the MFP first ensures that the USB drive is properly recognized and read.
  - b. Insert the drive in the USB port.
  - c. Turn the MFP back on.

5. Press the System Menu button on the MFP front panel. This button may be called System Menu/Counter on some models.  
The System Menu screen appears.
6. On the screen, tap **Application**. This button may be called Favorites/Application on some models. You may need to go to another page of the System Menu screen to locate the button.
7. When you are prompted to log on, enter the user name and password of an administrator on the device.  
The Application screen appears.
8. Tap **Add**.  
Some models have a + button on the upper right corner of the screen. Tap + to add applications. The screen lists applications available to install. One of them should be Kofax.
9. Tap the box to the left of Kofax to select it for installation.
10. Tap **Install**. When you are prompted to confirm, tap **Yes**.  
The screen indicates when the installation is complete.

## Configuring a secure connection with SSL

If you are using SSL and want the Kofax Kyocera client to validate the certificate, import the certificate for the server used by Kofax TotalAgility to the MFP and then set the client to validate the certificate. The Kofax Kyocera client does not validate the server certificate by default. Use the HyPAS Device Online page to import the certificate.

1. Log on to the HyPAS Device Online page as an administrator.  
See the Kyocera documentation for instructions.
2. Under Contents, click **Certificate**.  
The Certificate Manager Page appears.
3. Click **Import**.
4. In the Import Certificate window, click **Browse**.
5. Navigate to the folder containing the certificate file. Select the file and click **Open**.  
The Choose File to Upload window closes, and the full path to the file appears in the Import Certificate window.
6. Click **Import**.  
When the import is successful, the certificate appears in the Server Certificate list. If you want to view the certificate's details, click **View**.
7. Close the HyPAS Device Online page.

8. Configure the MFP to validate the imported certificate as follows:
  - a. Start the Kofax Kyocera client on the MFP.
  - b. Tap **Settings**.
  - c. Locate the **Validate server certificate** field, which may be on the second page of settings.
  - d. Change the setting for the **Validate server certificate** field to **true**.
  - e. Tap **OK**.
  - f. Restart the device.

The certificate is validated each time the MFP communicates with the server.

## Chapter 4

# Uninstalling the Kofax client software

Uninstall the Kofax client software if you are no longer using Kofax TotalAgility with the MFP or to deploy an updated version of the client software. Uninstall the current version of the client software before deploying a new version.

As with installation, you can uninstall the client software through Kyocera Net Viewer or directly on the device. Follow the applicable instructions.

## Uninstalling with Kyocera Net Viewer

1. Start Kyocera Net Viewer.
2. If the device with the client software has not already been discovered, add it.
3. Right-click the device and select **Advanced > Manage applications**.  
The Manage Applications window appears.
4. Select **Uninstall application** and click **Next**.
5. Select **Specify application installed on the device** and click **Next**.
6. When you are prompted to log on, enter the user name and password of an administrator on the device. Do not select **Use local authentication**. Click **OK** to log on.  
A list of applications installed on the device appears.
7. Select Kofax and click **Next**.
8. Click **Finish**.
9. When the client software has been uninstalled, click **Close**.

## Uninstalling directly from the device

1. Press the System Menu button on the MFP front panel. This button may be called System Menu/Counter on some models.  
The System Menu screen appears.
2. On the screen, tap **Application**. This button may be called Favorites/Application on some models. You may need to go to another page of the System Menu screen to locate the button.
3. When you are prompted to log on, enter the user name and password of an administrator on the device.  
The Application screen appears with Kofax listed as one of the installed applications.
4. Tap the box to the left of Kofax to select it for uninstallation.
5. Tap **Delete** or the trash can icon. When you are prompted to confirm, tap **Yes**.  
The screen indicates when the application has been uninstalled.

6. Tap **Close** or **End**, depending on your model.  
The System Menu screen closes.

## Chapter 5

# Additional information

The following is additional information which may be of interest to you when working with Kofax TotalAgility and the MFP.

## Handling of unsupported paper sizes

If a paper size defined in Devices is not supported by the device, the scanned image will be the largest paper size in the feeder. If the original image is smaller than the largest paper size, the image is kept at the original size with white space surrounding it.

## Minimum supported resolution

The minimum supported resolution for Kyocera MFPs is 200 dpi. If a document is sent to a destination or shortcut configured for 100 dpi, the image is scanned automatically at 200 dpi.

## Options for Scan/VRS profiles

The Scan/VRS Profiles Configuration page in Kofax TotalAgility Designer has the following options under Allow Run Time Edit to enable scan settings to be changed during runtime:

- Paper Size
- Duplex
- Resolution
- Color

By default, these options are set to Yes, and Resolution is automatically mapped to the nearest lower DPI value supported by the MFP. If a setting cannot be changed for an MFP model at runtime, it is disabled or removed on the MFP, and the setting specified in the Scan/VRS Profile is used for scanning.

## Image preview

Kyocera MFPs can display a preview of the image in the Scan Preview window.

**Note** Image preview requires Kyocera MFPs with API version 2.1.9 or newer. For information about supported devices, see the Technical Specifications document, which is available on the Kofax website at [www.kofax.com](http://www.kofax.com).

Enable the feature in the Devices. In the Advanced - Settings tab, set `mfp.scan.preview` in the `mfp.kyocera.properties` namespace to true. The change is applied when the Kofax client is started. Only newly scanned pages are displayed for preview.

The Scan Preview window shows the document you scanned and enables you to process it. Use these buttons to view the pages scanned:

- Under Page Tools, press the button to delete the currently displayed page.
- Under New Pages Navigation, press Left Arrow or Right Arrow to view the previous or next page.
- Under Zoom, select to view the image at its actual preview size or to fit the entire image in the window.

Then use these buttons to process the document:

- Press **Cancel** if you do not want to send this scan job.
- Press **Start New Job** to send this scan job and start a new scan job to the same location.
- Press **Add More Pages** to scan more pages to the current scan job.
- Press **Send and Exit** to send this scan job and return to the main menu.

After a period of inactivity, the MFP automatically sends the scan job and returns to the main menu.

## Hiding Log Off and Settings button

You can hide the Log Off and Settings buttons on the MFP client. Use the following settings in the `mfp.kyocera.properties` namespace:

- `logoff.button`: Display or hide the Log Off button on the MFP client. Set to true (default) to display the button or false to hide it.
- `settings.button`: Display or hide the Settings button on the MFP client. Set to true (default) to display the button or false to hide it.

## Configuring split login

Split login enables you to configure an MFP so that a user does not need to provide a password to access the device or shortcuts. At the same time, the device authentication with the server is preserved.

When split login is enabled, the following occurs:

- When users tap Log On on the device, they are prompted for their user name but not their password.
- When users tap on a personal shortcut, they are also not prompted to enter a password, unless it is a DCNJ shortcut or a shortcut configured so that a password is required.

A password is required the first time you use an MFP when Require Authentication for Device Registration is enabled in Devices. When authentication is successful, the device is registered. If split login is enabled,



users are not prompted for a password unless required for a shortcut. If the device is configured for single sign-on (SSO) with the server, a password is not required.

Follow these steps to configure split login in Kofax TotalAgility. See the help for more details.

1. Configure the process so that it uses split login.
  - a. In Kofax TotalAgility Designer, open the process and select the activity you want to configure.
  - b. Open the **Extended Properties** for the activity.
  - c. Click **Advanced**.
  - d. Set the **MFP Ready** field to **MFP Only - No Password Required**.
  - e. Accept the changes and complete your changes to the process.
2. Configure the device to use split login.
  - a. In Kofax TotalAgility Designer, select **System Settings > Devices**.  
The Devices application appears in a browser window.
  - b. Select **Device Profiles**.
  - c. Select the **General** tab, if it has not already been selected.
  - d. In the **Logon** field, select **Allow Split Login**.
  - e. Associate the devices with the profile and make any desired setting changes.
  - f. Save the profile.

## Chapter 6

# Frequently asked questions

If you cannot successfully install the software, or if you have questions about how the software operates, see the information in this section. For additional information and software updates, see the Kofax website.

### **Why does clicking Discover not find the MFP?**

Use the Refresh command to update the list of discovered devices. The MFP may be offline, on a separate network, outside a firewall, or does not have a PostScript card installed. See the MFP documentation for instructions. If the Refresh option still does not find the MFP, add the MFP manually. See the Devices Help for instructions.

### **Why am I unable to add MFPs?**

There may not be sufficient licensing available to support the MFPs you want to add. Deactivate or remove MFPs from the available devices list or purchase a license for additional devices.

### **Why do forms not appear on the Kyocera MFP?**

Before you can see forms on the MFP, install and start the Kofax TotalAgility client software on the Kyocera MFP. See [Installing the Kofax client software](#) for instructions.

### **I entered my user name and password correctly at the MFP. Why am I unable to log on?**

The MFP may not be able to retrieve authentication information if the connection to Kofax TotalAgility is down. Make sure that the MFP is connected to the network and Kofax TotalAgility is running.

### **When I start the Kofax client software on the MFP, an error indicates that the device is unlicensed.**

The device may have been deactivated or removed in Devices. Run Devices and make sure that the MFP is listen on the Added Devices tab.

### **The Kofax front panel displays only a limited number of buttons. Where are the rest of the buttons?**

Use the Kofax TotalAgility Designer to create device job forms. The forms appear as shortcut buttons on the MFP front panel when you associate them with a device profile. When the MFP retrieves the device profile, the buttons should appear.

### **When I send a job from the device, I get an "Unable to connect to the server" error. Does this mean the job is lost?**

If the connection to the server is interrupted while a job is being sent, it will resume and be sent successfully when the connection is restored.