

Kofax TotalAgility

Administrator's Guide for Canon MEAP Devices

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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 weight throughout the word.

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Preface

This guide describes how to prepare a Canon MEAP devices to work with Kofax TotalAgility.

See the Kofax website at 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

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 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

Kofax TotalAgility offers the following features with the Canon device.

- **Management through Devices in the Kofax TotalAgility Designer (Optional)**
MFPs are able to self-register with Devices and automatically activate licenses. See the Devices Help for more information.
- **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.

Status	Description
Pending*	The job is waiting to be sent to the server.
Sending*	Sending the job from the device or from the configured FTP 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.
Pending Retry*	The job failed to be sent and another attempt will be made. This message indicates the number of the retry attempt.
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 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. The

duration between attempts is set in Designer with a Kofax TotalAgility system task. 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.

- 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, as well as form validation. For information about the necessary configuration steps, see the Kofax TotalAgility Designer 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.

- 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

Installation of the Kofax TotalAgility client software on the MFP

Use the following procedures to install or upgrade the Kofax TotalAgility client software.

Preparing for the installation

Before installing the Kofax TotalAgility client software on the MFP, do the following:

- Make sure the Device - Canon station license is installed.
- Install Kofax TotalAgility.
- Download the client software for Canon MFPs from Devices to your computer by selecting **Canon**. Extract the downloaded Canon.zip file and all subfolders.
- Make sure that you have an open port for communication between Kofax TotalAgility and the MFP.
- Check your MFP manual for memory requirements. If you scan at 400 dpi color or grayscale (configurable in the shortcut settings for the device profile), scanning could fail for MFPs that do not have expanded memory.
- If you are using SSL, make sure that a valid server certificate is installed on the MFP. Your certificate must use the RSA algorithm. See the documentation for your device for instructions.

Installing the Kofax TotalAgility client software

Client software installation requires several steps:

1. [Generate the license file.](#)
2. [Install the client software and license file.](#)
3. [Set up authentication.](#)
4. [Complete the installation.](#)

Generate the license file

Use the Canon License Management System to generate a license file with your License Access Number provided with the client software and the serial numbers of the devices you want to register. This creates a .lic file you install through SMS. Follow these steps.

1. Gather the serial numbers of the Canon MEAP devices you want to register. If you are registering 11 or more devices, enter their serial numbers in a .csv file. (You can download a sample .csv file later in this procedure.)

2. Get the License Access Number by doing the following:
 - a. Navigate to the folder where you downloaded the Canon client software.
 - b. Open the `client\EMEA` or `client\NorthAmerica`, depending on the region of your device.
 - c. Open `KofaxCanonClient_LAN.txt` with a text editor.
The file contains a string, which is the License Access Number.
 - d. Copy the string to paste.
3. Go to the **Canon License Management System** page at this URL: <http://www.canon.com/meap>.
4. At the License Issuance page, paste or enter the License Access Number into the **License Access Number** field. Click **Next**.
The **Product Check** page appears and displays information about your license.
5. Click **Apply to Issue a License**.
6. At the **Serial Number Registration** page, enter the serial numbers by doing either of the following:

Option	Description
<p>Enter individual serial numbers.</p>	<ol style="list-style-type: none"> a. Select Enter Device Serial Number. b. Enter the serial numbers into each field (up to 10).
<p>Upload serial numbers as a CSV file.</p>	<ol style="list-style-type: none"> a. Select Batch Register Several Device Serial Numbers Using a File (.csv). b. Click Download Sample File (.csv) to download a template for specifying serial numbers. c. Create a .csv file for your serial numbers using the format in the template. d. Click Browse. e. Select the .csv file for your serial numbers.

7. Click **Next**.
8. If prompted, reenter the serial numbers to confirm and then click **Next**.
9. At the **Information Confirmation** page, click **License File Issuance**.
When the license has been generated, the message **The license file has been issued** appears.
10. Click **Download a License File**. Save the .lic file to the same folder where you downloaded the Canon client software.

Install the client software and license file

1. From your browser, launch the Service Management Service (SMS) at `http://<IP address of the Canon MFP>:8000/sms/`. Log on as a user with MEAP installation rights.
2. Go to the SMS installation page (directions may vary, depending on the version of SMS on the MFP).

3. Select the application file:
 - a. Click **Browse** to the right of the Application File field.
 - b. Navigate to the folder where you downloaded the Canon client software.
 - c. Open the `client\EMEA` or `client\NorthAmerica`, depending on the region of your device.
 - d. Select `KofaxCanonClient.jar`.
 - e. Click **OK**.
 - f. Follow the **SMS** instructions to complete the installation.
4. Install the license file as follows:
 - a. Go to the **System Management Services** page and select **System Management > Enhanced System Application Management**.
 - b. Under **Install Enhanced System Application/License**, click **Browse**.
 - c. Navigate to the folder where you download the Canon client software and saved the .lic file.
 - d. Click **Install**.

Set up authentication

1. On the Application page, click **Kofax**.
2. Enter the department ID and password for a Canon user with the appropriate rights. and click **Set**.
3. When the authentication information is set, click **OK**.
4. Return to the Application List page and start the Kofax TotalAgility application.
After the application is started, the **Kofax** button is added to the MFP screen.

Complete the installation

1. Log on to the MFP using an account with administrator rights to the device.
2. On the MFP, press the **Kofax** button. Depending on the installation history, do one of the following:
 - For installations, the **Settings** page appears.
 - For upgrades, if the **Settings** page does not open automatically, press **Settings**.
3. On the **Settings** page, set the following options. For more information, press **Help**.
 - a. Enter the host name or IP address of Kofax TotalAgility.
 - b. If Kofax TotalAgility uses a virtual directory, enter the name of the directory in the **Path** field. For example, if you are using the default path for an on-premise deployment of Kofax TotalAgility,

enter TotalAgility. If you are using Kofax TotalAgility in a Software as a Service environment, leave the field blank.

- c. Depending on the type of connection between the server and the MFP, select the following options:
 - For **Server protocol**, select either **http** or **https**. The default port listed in the **Server port** field changes to the default port of 80 for http or 443 for https.
 - For **Server port**, select either the default port (80 or 443) or select the option with the blank field and enter the port number.
 - If you are using https, select **Validate server certificate** to validate the server certificate's chain and expiration date. This enables the MFP to verify that the server certificate is valid. If you trust the certificate from the server that is device is connecting to and want to bypass validation, you can leave **Validate server certificate** cleared.
- d. Set the options for **Scan duplex**, **Scan resolution**, and **Scan color**.
- e. Press **OK**.

The main menu appears on the front panel.

4. Use **Devices** to make sure the MFP is added to the **Devices** list and add the MFP to a device profile.

Uninstalling the Kofax TotalAgility client software

You can uninstall the Kofax TotalAgility client software when needed. Before uninstalling the client software, make sure that any scanned documents have been processed.

Note During the uninstallation process, you will be stopping Kofax TotalAgility. If you do so before a scan job is completed and received, the interruption will most likely cause data loss.

1. From your browser, launch SMS at `http://<IP address of the Canon MFP>:8000/sms/`. Log on as a user with MEAP installation rights.
2. In the **MEAP Application Management** list, find the Kofax TotalAgility client software and do the following:
 - a. Stop the client software.
 - b. Click the link for the Kofax client software.
 - c. Click **Disable**.
 - d. Click **Download** to download a license file and save it to a secure folder.

Important This step is required if you are reinstalling the software on this MFP. The license file you used to install the software cannot be used after you uninstall. If you do not download a license file during uninstallation, contact Kofax Technical Support for assistance with obtaining a new license file.

- e. Click **Delete**. When you are prompted to confirm the deletion, click **Yes**.
- f. Return to the **MEAP Application Management** list.

3. Click **Uninstall** next to the Kofax client software. When you are prompted to confirm, click **Yes**. The software is removed from the device.

Chapter 3

Additional information

The following is additional information you may need when working with Kofax TotalAgility and the MFP.

Support for single sign on

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

Use this setting in Devices by selecting **Settings > Advanced**, or creating this setting if it does not exist.

- Namespace: mfp.canon.properties
- Name: sso.mapped.activedirectory.attributes
- Value: <domain>=singleSignOnUID where <domain> is the name of the domain and singleSignOnUID is a variable for the user name.

For example, if the domain for your users is mfpusers with user IDs such as mfpusers\enduser1, enter mfpusers=singleSignOnUID. The user ID enduser1 is passed with singleSignOnUID.

You can specify more than one domain by separating them with commas, like this:

mfpusers=singleSignOnUID,mfpadmins=singleSignOnUID.

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.

Image preview

Canon devices can display a preview of the image.

Enable the feature in Devices. In the Advanced - Settings tab, set mfp.scan.preview in the mfp.canon.properties namespace to true.

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

- Press the four arrow buttons to the right of the image to view more of the page.
- Press the left and right arrow buttons at the upper right to move to the previous or next page of the document.

- Press **Del** to delete the displayed page from the job.
- Select **Large size** to view more of the page or **Fit window** or to see the entire page.

Then use these buttons to process the document:

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

After a period of inactivity, the MFP automatically sends the scan job and returns to the main menu. Images in the device are deleted when the job is sent or canceled.

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.