

# Kofax TotalAgility

Administrator's Guide for Canon MFPs

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# Administrator's Guide for Canon MFPs

## Preface

This guide describes how to prepare a Canon multifunction peripheral (MFP) to work with Kofax TotalAgility.

See the Kofax website at [www.kofax.com](http://www.kofax.com) for supported models and application versions.

## Related documentation

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 for Kofax products

Kofax regularly updates the Kofax Support site with the latest information about Kofax products.

To access some resources, you must have a valid Support Agreement with an authorized Kofax Reseller/ Partner or with Kofax directly.

Use the tools that Kofax provides for researching and identifying issues. For example, use the Kofax Support site to search for answers about messages, keywords, and product issues. To access the Kofax Support page, go to [www.kofax.com/support](http://www.kofax.com/support).

The Kofax Support page provides:

- Product information and release news
  - Click a product family, select a product, and select a version number.
- Downloadable product documentation

Click a product family, select a product, and click **Documentation**.

- Access to product knowledge bases

Click **Knowledge Base**.

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

Click **Account Management** and log in.

To optimize your use of the portal, go to the Kofax Customer Portal login page and click the link to open the *Guide to the Kofax Support Portal*. This guide describes how to access the support site, what to do before contacting the support team, how to open a new case or view an open case, and what information to collect before opening a case.

- Access to support tools

Click **Tools** and select the tool to use.

- Information about the support commitment for Kofax products

Click **Support Details** and select **Kofax Support Commitment**.

Use these tools to find answers to questions that you have, to learn about new functionality, and to research possible solutions to current issues.

## Features

Kofax TotalAgility offers the following features with the Canon MFP.

- 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.

**Note** Some MFP models do not include a Scan History button.

Status	Description
Pending	Submitted but not uploaded to server yet. or Ready to start scanning.
Completed	Successfully sent to destination.
Deleted	User deleted transaction from the inbox, or the administrator removed it during transaction review.

- **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 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.

- **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.

## 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:

- Install Kofax TotalAgility.
- Download the client software for Canon MFPs from Devices to your computer by selecting one of these options:
  - CanonScanFront: For Canon imageFormula ScanFront.
  - Canon: For all other models.
- 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.

## Installing the Kofax TotalAgility client software

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:
  1. Click **Browse** to the right of the Application File field.
  2. Navigate to the folder where you downloaded the Canon client software.
  3. Select the file with the .jar extension.
4. Select the license file as follows:
  1. To the right of the License File field, click **Browse**.
  2. Navigate to the folder where you downloaded the Canon client software.
  3. Select the license file, which has a .lic extension.

**Important** The license file can only be used to install client software once per MFP. After a license file has been used, it cannot be reused. When you uninstall the client software, follow the step to download a new licence file so it can be used when reinstalling.

5. Click **OK**.
6. Follow the **SMS** instructions to complete the installation.

## Setting 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.

## Completing 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**.
  1. Enter the host name or IP address of Kofax TotalAgility.

2. 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.
3. 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.
4. Set the options for **Scan duplex**, **Scan resolution**, and **Scan color**.
5. 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.

## Installing the client software on Canon imageFormula ScanFront MFPs

The installation procedure for Canon imageFormula ScanFront MFPs is different from other Canon models. Follow these general steps:

1. Get the IP address and set the device to Web application mode.
2. Register the device by using either of the following methods:
  - Use **Devices** to add the device manually. Follow the instructions in the **Devices Help**. Specify the IP address and type **Canon** in the **Vendor** field.
  - Use the Kofax Canon Registration Client.
3. In **Devices**, go to the **Settings - Advanced** tab and set the following properties in the **mfp.canon.properties** namespace:
  - **mfp.password**: Enter the administrator's password for the device.
  - **mfp.port**: Enter the port number of the device (default is 80).
  - **mfp.protocol**: Enter the protocol used to the communicate with the device, either http or https (default is http).

## Getting the IP address and setting the device to web application mode

1. At the device's home screen, tap **Administrator Setting**.  
The **Administrator setting** screen appears.
2. Tap **Network setting**.
3. At the **Network setting** screen, note the IP address and write it down to use in later steps.
4. Tap **Cancel** to return to the **Administrator setting** screen.
5. Tap the **Down Arrow** button to go to the second page of administrator settings.
6. Tap **Change to the web application mode**.



7. When you are prompted to confirm the setting, tap **Yes**.  
The device restarts.
8. When the following error occurs, **Could not access the server. Check the settings**, tap **OK** to close the message.
9. Enable remote operation by following these steps:
  1. Enter the password to go to the **ScanFront Maintenance** screen.
  2. Tap **Device Operation**.
  3. Tap **The device detail settings**.
  4. On the Device Detail Settings screen, change **Allow remote operation** to **On**. Tap **OK**.
  5. Tap **Close** to return to the **ScanFront Maintenance** screen.

## Using the Kofax Canon Registration Client

1. Navigate to the `C:\ProgramData\Kofax\CaptureSV\KFS4.1\MFPClients\CanonScanFront` folder.
2. Run `KofaxCanonRegistration.exe`.  
The Kofax Canon Registration Client starts.
3. In the **Device Connection** section, provide information for the MFPs you are registering. To register multiple MFPs at one time, use one of the following options.

**Important** To register multiple MFPs, the administrator credentials must be the same on every MFP.

- Enter MFP host names or IP addresses separated by commas into the **Device IP or Hostname** field.
- If you have a file that is generated by MFP management software, select the character used to separate each entry (a comma, tab, or semicolon) in the **Delimiter**. Make sure each MFP is on a separate line and the IP address or host name is the first entry. In this example, the IP address, host name, MAC address, and model name are delimited by commas.

```
173.21.45.23,purchasing01,11-22-33-44-55-66,Purchasing 1
173.21.45.24,purchasing02,11-22-33-44-55-67,Purchasing 2
173.21.45.25,purchasing03,11-22-33-44-55-68,Purchasing 3
173.21.45.26,purchasing04,11-22-33-44-55-69,Purchasing 4
173.21.45.27,purchasing05,11-22-33-44-55-70,Purchasing 5
```

If the first entry is not an IP address or host name, correct it before attempting to import the file.

- Create a text file to import with all your IP addresses or host names with a line break after each, as shown in the following example. If you use this method, it does not matter what is selected in the **Delimiter** field.

```
173.21.45.28
173.21.45.29
173.21.45.30
173.21.45.31
173.21.45.32
```

If you have a file to import, click **CSV File** and select the file.

4. Enter the administrator password for the device.
5. Select the MFP model type.

6. Complete the **Registration** section:
  1. Enter the host name or IP address of Kofax TotalAgility.
  2. To verify that the host name or IP address is correct, click **Test**.  
A window indicates whether the connection is successful or not. Click **OK** to close the window.
  3. If Kofax TotalAgility uses a virtual directory, enter the name of the directory in the **Path** field.
  4. Select the type of connections in **Server Protocol** field, either **http** or **https**.
7. Click **Register**.  
When the registration process is completed, the **Registration Results** window lists successful deployments as well as any errors. Right-click and copy one or more selected items or all failed items.
8. When you finish viewing the **Registration Results** window, click **OK** to close the Kofax Canon Registration Client program.  
The Kofax application appears on the device after it restarts.

## Specifying the server

Specify the server (or proxy server for a cluster configuration) so that images can be properly scanned and sent.

1. In Devices, click **Settings > Advanced**.
2. In the kfs.properties namespace, find the ProxyServer property.
3. Enter the host number or IP address of the server (or the proxy server for a cluster configuration) used by Kofax TotalAgility.

## Unregistering a Canon imageFORMULA ScanFront MFP

Before unregistering a Canon imageFORMULA ScanFront MFP, make sure that there is not a user or session that is actively using the device. An "Illegal access" error occurs if there is an active user or session when you attempt to unregister.

## Setting up HTTPS with Canon imageFormula ScanFront MFPs

The protocol used by Canon imageFormula ScanFront MFPs is configured with IIS. It is not affected by the setting in Kofax TotalAgility, and it does not require Require SSL to be set.

## 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:
  1. Stop the client software.
  2. Click the link for the Kofax client software.
  3. Click **Disable**.
  4. 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, you need to obtain a new license file from Canon before you reinstall.
  5. Click **Delete**. When you are prompted to confirm the deletion, click **Yes**.
  6. 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.

## Additional information

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

### Scan with short edge feed

Always scan documents with the short edge feed so that it uses portrait mode. If you attempt to scan in landscape mode with the long edge feed, the scanned image is cropped to portrait.

### Handling of unsupported paper sizes

If a paper size defined in Devices is not supported by the MFP, 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.

### Configuration for sending jobs from Canon imageFormula ScanFront MFPs

By default, jobs are sent automatically from an MFP after a period of inactivity. For Canon imageFormula ScanFront MFPs, you can configure the duration by using the following settings on the Settings - Advanced tab in Devices. These are in the `mfp.canon.properties` namespace.

- `server.max.job.age.mins`: Number of minutes before submitting an incomplete job on ScanFront devices. (The default is 60.)
- `timeout.scancomplete.mins`: Number of minutes the Scan Complete screen remains on screen before sending and exiting automatically. (The default is 5.)

## Image preview

Canon MFPs can display a preview of the image in the Scan Complete window.

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

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

- Press the arrow buttons below and to the right of the image to view more of the page.
- Press << or >> to move to the previous or next page of the document.
- Press Del to delete the currently displayed page.
- Use the zoom field (which displays Large Size by default) to view more or less of the 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 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 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. 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.

**Note** On certain MFPs, the resolution on the Scan/VRS Profile does not appear on the device. If you set the resolution to 600 dpi on the Scan/VRS Profile, the setting on the device is 400 dpi. This is because the Scan/VRS Profile has resolution settings of 100, 200, 300, and 400 dpi, even though the device can support higher resolutions. Change the resolution on the front panel before scanning the document.