

Kofax TotalAgility

Administrator's Guide for Lexmark MFPs

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Administrator's Guide for Lexmark MFPs

Preface

This guide describes how to prepare a Lexmark multifunction peripheral (MFP) to work with Kofax TotalAgility. Included are instructions to deploy the Kofax TotalAgility app for devices with the Cloud Solutions Framework (cSF) and Embedded Solutions Framework (eSF). After performing the applicable procedures for these devices, associate device profiles with shortcuts from Devices whenever needed.

Before continuing, see the Kofax website at 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 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.

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

The following features are available with the Kofax TotalAgility app for the Lexmark MFP.

- 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.
On eSF devices, you can use the split login feature so that users do not have to provide a password to access the device or use their shortcuts.
- 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.

System requirements

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

Before installing the Kofax TotalAgility app for the MFP, also note the following:

- Make sure the MFP has a hard drive with sufficient storage space for images. Models without a hard drive are not supported.
- Make sure the MFP has a color touch screen. Models without a color touch screen are not supported.

- If you are using the cSF app, SSL must be enabled on the Kofax TotalAgility server.
- If you are using a cSF app in an on-premise environment, disable Windows Authentication on the Web server, which is enabled by default. Windows Authentication must be disabled so that local Kofax TotalAgility resources can connect. If you have applications that require Windows Authentication, create a separate Web server for cSF apps with Windows Authentication disabled.

Installing Kofax TotalAgility on the MFP

You can install the Kofax TotalAgility app on the MFP using one of the following methods:

- Use Devices to deploy the app to multiple devices with cSF capabilities. The app is deployed using settings in the Advanced tab.
- Use the Lexmark Registration Client to deploy the app to one or more devices with cSF capabilities. The Lexmark Registration Client enables you to select options through a user interface, and it provides more detailed reporting.
- Install the eSF app directly on an individual MFP.

Before you begin, download the Lexmark client from Devices. See the Devices help for instructions.

Deploying through Devices (cSF devices only)

If you are deploying the Kofax TotalAgility app through Devices, first configure settings on the Advanced tab and then deploy to the devices you select.

1. In the **Navigation** panel, click **Settings** and then the **Advanced** tab.
2. Set the following settings in the `mfp.lexmark.properties` namespace.
 - `lexmark.csf.application.cert`: Server certificate public key for cSF app.
 - `lexmark.csf.application.additionalcerts`: Additional certificates for use by the cSF app.
 - `lexmark.csf.application.icon`: Application icon for the cSF app. If left blank, the default icon provided with the app is used. See [Custom icons for cSF apps](#) for requirements.
 - `lexmark.csf.application.name`: Name to display for the cSF app. If left blank, the default name provided with the app is used.
 - `lexmark.csf.application.url`: URL of the app on the server.
3. In the **Navigation** panel, click **Devices**.
4. On the **Devices** tab, select the devices you want to deploy the app to and click **Deploy**. The window indicates whether deployment was successful on all MFPs or the ones where deployment failed.

Using the Lexmark Registration Client (cSF devices only)

Use the Lexmark Registration Client to install the Kofax TotalAgility app to one or more cSF devices.

1. In the folder where you downloaded and extracted the client software, run `RegisterLexmarkClient.exe`.
The **Lexmark Registration Client** window opens.

2. In the **Device IP or Hostname** field, enter the IP address or host name of the MFP you are registering. To register multiple MFPs at one time, do one of the following:
 - 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.

3. Complete the fields in the **cSF Settings** section as follows:
 1. To use a custom name for the app, enter it in the **Application Name** field.
Leave this field blank to use the default name.
 2. For the **Certificate Public Key** and **Additional Certificates** fields, click **Select** and choose the path and file for the certificate from the window that appears.
 3. Use the **Application URL** table to assign URLs for the application. A different version of the application can be used for each of the standard Lexmark screen sizes and resolutions, and the Lexmark Registration Client uses the URL that matches the screen size. The **Other** option is used for screen sizes and resolutions other than the ones listed. If no URL is found for a device, an error occurs.
 4. To use a custom icon for the app, use the **Application Custom Icon** field. Click **Select** and choose the path and file for the icon from the window that appears.
Leave this field blank to use the default icon.
4. Click **Register**.

The Lexmark Registration Client validates the fields based on the deployment mode you selected and indicates any missing fields. The progress bar at the bottom of the window indicates the status of the registration.

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 select them all.
5. When you finish viewing the **Registration Results** window, click **OK** and close the Lexmark Registration Client.

Note You can unregister an cSF app from the devices listed in the Device IP or Hostname or a selected CSV file by clicking **Unregister**.

Installing the eSF app directly on the MFP

When installing the eSF app directly on the MFP, installation of the Kofax TotalAgility app consists of the following processes:

- Installing the application on the MFP.
- Configuring the MFP to connect to Kofax TotalAgility.
- Making sure the client software on the MFP has started.

Follow these steps to install the Kofax TotalAgility app on a single MFP. This procedure only applies to the eSF app. If you are installing the cSF app, deploy through Devices or use the Lexmark Registration Client.

1. Enter the URL for the MFP in your browser window.
2. On the **Device Status** page, click **Configuration** or **Settings**, depending on the model.
3. On the page that appears, select either of the following, depending on the model.
 - For Android models, click **Apps**.
 - For all other models, click **Embedded Solutions**, which is located under **Other Settings**.
4. Click **Install**.
5. On the **Install A New Solution** page, for the **Solution Install File** box, click **Browse**.
6. In the **Choose file** window, locate and open the file that applies to your device.
 - KofaxLexmarkAndroidClient.flx: For Android Lexmark models.
 - KofaxLexmarkClient.flx: For all other Lexmark models.

Note If you are unable to use KofaxLexmarkClient.flx because of network bandwidth or disk space on the MFP, you can use KofaxLexmarkClient_compact.flx instead. This file contains all features except the Japanese keyboard. If either the KofaxLexmarkClient.flx or KofaxLexmarkClient_compact.flx file cannot be installed directly because of limitations on the device, you can install the client software by uploading it to the device as shown in [Uploading the client software file with FTP or embedded web server](#).

Locate the appropriate file in the folder where you downloaded and extracted the client software.

7. On the **Install A New Solution** page, with the path and file now appearing in the **Solution Install File** box, click **Start Install**.
When the installation is complete, Kofax appears on the **Installed Solutions** page, under **Installed Solutions**.
8. Continue the installation as shown in [Configuring the MFP to connect to Kofax TotalAgility](#).

Configuring the MFP to connect to Kofax TotalAgility

If you are installing an eSF app, follow these steps to complete the configuration.

1. On the MFP, go to the **Installed Solutions** page.
2. Under **Installed Solutions**, select **Kofax**
3. On the Kofax **Configuration** page, click **Configure**.

Note Labels on the Web interface may differ depending on the model. For example, **Configuration** may be labeled "**Settings.**"

4. On the **Configure** page, change the configuration settings associated with Kofax TotalAgility as needed. Move your mouse pointer over the question mark (?) buttons to display Help for each setting.

Note the following:

- The supported resolutions are 150, 200 (recommended), 300, and 400 dpi.
- 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.

5. Click **Apply**.

6. Verify that the Kofax client software has started:

1. On the Kofax **Configuration** page, click the **Solutions** tab.
2. On the **Installed Solutions** page, under **State**, make sure **Running** is indicated in the **State** column for Kofax Front Office Server.

If **Running** is not indicated, start the Kofax client software as follows:

- Select the check box to the left of Kofax.
- Click **Start**.

The **State** column indicates **Running**.

After closing the page, a Kofax button appears on the MFP Home screen.

The MFP is now ready to use with Kofax TotalAgility. Depending on the Devices settings, pressing the Kofax button causes the MFP to self-register and license itself, and connect to the default device profile if one is defined. See the Devices Help for information about self registration and default device profiles.

Removing the eSF App Directly on the MFP

You can remove the app when needed. Before removing the software, make sure that any scanned documents have been received.

Important Make sure that scan jobs have been completed before removing the client software. The removal process stops the client software. Jobs that were not completed and received can be lost.

1. Entering the URL for the MFP in your browser window.
2. On the **Device Status** page, click **Configuration** (on the left side of the page).

Note Labels on the Web interface may differ depending on the model. For example, **Configuration** may be labeled "**Settings.**"

3. On the **Configuration** page, under **Other Settings**, select **Embedded Solutions**.
4. On the **Installed Solutions** page, under **Installed Solutions**, select the check box to the left of Kofax.
5. Click **Stop**.

The **State** column indicates **Stopped**.

6. Select the check box to the left of Kofax and click **Uninstall**.

The Kofax client software is removed from the list of installed solutions.

Upgrading Kofax TotalAgility on the MFP

To upgrade Kofax TotalAgility on the MFP, do the following:

- For cSF apps, use Devices or the Lexmark Registration Client. You do not have to uninstall the previous version. When the installation is complete, the new version of Kofax TotalAgility appears in the Installed Solutions or Installed Apps page.
- To upgrade Kofax TotalAgility on the MFP, remove the app as shown in [Removing the eSF App Directly on the MFP](#) and then install the new version as shown in [Installing the eSF app directly on the MFP](#).

Configuring split login (eSF devices only)

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

6. Save the profile.

Device profiles updates

When a device profile associated with an MFP changes, the changes are reflected on the front panel of the MFP when it polls Kofax TotalAgility. This poll occurs when the Kofax TotalAgility client software button is pressed. To ensure the MFP contains the most current device profile information, do the following:

- Make changes to device profiles when there is low user activity, such as at night.
- Set the MFP inactivity timeout to a short period, such as one to three minutes, so that the next user who presses the Kofax button retrieves the latest profile.

MFP shutdown

When you shut down the MFP, be aware of the following:

- Allow 10 seconds after performing the last scan job before shutting down the MFP.
- If you shut down the MFP before responding to the prompts on the Scan Complete page, scanned pages can be lost.
- If you shut down the MFP after the scan job is complete but before all scanned pages are delivered, delivery should finish when you turn on the MFP again.

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 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.

Scan settings for Lexmark Android devices

On Lexmark Android devices, if the scan profile contains setting combinations that cannot be achieved on the device (such as selecting the ADF and a paper size that cannot fit in the feeder), the device may override the settings defined in your scan profile. Review the settings in Scan/Profile before scanning.

Uploading the client software file with FTP or embedded web server

If the client software cannot be installed directly on the MFP, upload it to the device using FTP. If FTP is not available, you can use the Embedded Web Server (EWS). You can upload either

KofaxLexmarkClient.flx if you have sufficient drive space or KofaxLexmarkClient_compact.flx if you have limited drive space and do not require the Japanese keyboard.

Before you begin, make sure you have downloaded the Lexmark client from Devices and extracted the .flx files to a folder on your computer.

To upload using FTP, do the following:

1. Run an FTP client program and put the session in binary mode.
2. Connect to the Lexmark MFP using its IP address or host name.
3. Upload the .flx file to the device.

If you need to use EWS, do the following:

1. In EWS, click **Settings > Update Firmware**.
2. Click **Choose File**.
3. Select the .flx file.
4. Click **Submit**.

The client software file is installed.

Custom icons for cSF apps

If you want to use a custom icon for a cSF app, make sure it meets the following requirements:

- Saved in RGB .png format. (Indexed .png is not supported.)
- Maximum size of 384 x 384 pixels.
- Transparent background.
- 8-bit color depth.
- Maximum size of 128 KB.

Lexmark X548 default settings and color scans

On the Lexmark X548, grayscale images of originals with a colored background may require scanning at 300 dpi resolution instead of the default 200 dpi. The higher resolution enables Kofax VRS to remove the background and resolve text clearly when the scanned images are converted to bitonal images.

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.

Configuration for large scan jobs

When sending large jobs (such as 160 pages at 600 dpi or 700 pages at 300 dpi) with a Lexmark cSF device, it may be necessary to increase the default `maxReceivedMessageSize` setting in `Web.config`. In the folder where you installed Kofax TotalAgility, go to the `Agility.Server.Web` folder and open `Web.config` with a text editor. Locate the `<binding>` element and the `maxReceivedMessageSize` attribute (shown in bold).

```
<binding name="WebHttpBinding_DeviceStreamingService" openTimeout="00:10:00"  
closeTimeout="00:10:00" sendTimeout="00:10:00" receiveTimeout="00:10:00"  
maxBufferSize="2147483647" maxReceivedMessageSize="2147483647" transferMode="Streamed">
```

The default setting of 2147483647 can handle approximately 350 color pages at 300 dpi. For larger jobs, increase the value to a maximum of 4294967295 (1 byte less than 4 GB) to support the resolution and number of pages. Jobs larger than 4 GB are not supported.

Timeouts when scanning from Lexmark cSF MFPs

When using a Lexmark MFP with a cSF client, the Kofax TotalAgility server times out when it has not received data from the device within a period of time. A long delay during scanning, such as an unresolved paper jam, can cause the server to time out. After the timeout, the device cannot send data for the current scan job, and it may still be unavailable when you start a new job.

If you are unable to scan, wait for a few moments for the condition to clear and try scanning again.

You can adjust the duration that the server waits before timing out in the IIS. Increase the Connection Time-out setting for the website used by Kofax TotalAgility server, such as the Default Web Site. Choose a timeout duration that best fits any reasonable delays. See the IIS documentation for instructions.

Even if you extend the setting, the device may still time out. This is independent of the server setting. The device timeout might not always be apparent. You may be able to scan a document after the delay, but the document does not get to the server.