

# Kofax TotalAgility

Administrator's Guide for Kyocera MFPs

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# Administrator's Guide for Kyocera MFPs

## 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/KTA/750-4kcae04o43/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 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

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.

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.

**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.

## 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 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.

## 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 file, KofaxKyoceraClient.pkg.
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 KofaxKyoceraClient.pkg.



- 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. Click **Finish**.  
When the installation is finished, the status bar in the **Managed Applications** window turns solid and the status below the list of devices indicates that all devices have been processed.
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 file, KofaxKyoceraClient.pkg.
3. Copy KofaxKyoceraClient.pkg to the USB drive.  
KofaxKyoceraClient.pkg must be the only file on the USB drive.
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.

## 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.

## 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.

### 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.

### 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.

## 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 doesn't clicking Discover 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.