Kofax TotalAgility
Administrator's Guide for Konica Minolta MFPs

Version: 8.0.0

Date: 2024-02-07

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Preface

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

Before continuing, see the Technical Specifications document, which is available on the Kofax website at www.kofax.com, for supported models and application versions.

> ⛔ 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/8.0.0-ivy45l9g96/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 Portal repository contains articles that are updated on a regular basis to keep you informed about Kofax products. We encourage you to use the Knowledge Portal to obtain answers to your product questions.

To access the Kofax Knowledge Portal, go to https://knowledge.kofax.com.

ⓘ The Kofax Knowledge Portal is optimized for use with Google Chrome, Mozilla Firefox, or Microsoft Edge.

The Kofax Knowledge Portal 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.

    To locate articles, go to the Knowledge Portal home page and select the applicable Solution Family for your product, or click the View All Products button.

From the Knowledge Portal home page, you can:
- Access the Kofax Community (for all customers).

    On the Resources menu, click the **Community** link.
- Access the Kofax Customer Portal (for eligible customers).

    Go to the Support Portal Information page and click **Log in to the Customer Portal**.
- Access the Kofax Partner Portal (for eligible partners).

    Go to the Support Portal Information page and click **Log in to the Partner Portal**.
- Access Kofax support commitments, lifecycle policies, electronic fulfillment details, and self-service tools.

    Go to the Support Details page and select the appropriate article.

Chapter 1

Features

The following features are available with the Kofax TotalAgility client software for the Konica Minolta 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 and is not available in cloud configurations.) 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.

  Note the following when using shortcuts with Konica Minolta MFPs:

  - Where there is only one shortcut, it is not automatically selected by the device.
  - Konica Minolta MFPs do *not* support shortcuts with more than 20 fields. The shortcut appears on the front panel, but it cannot be used.
  - Shortcut names should be limited to a maximum of 32 characters. Longer names are truncated on the 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 Front Office Server 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.

  > ⓘ Some MFP models do not include a Scan History button.

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.
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 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.	

- 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.

- Display confirmation messages

  This MFP does not support display of confirmation messages.

- 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.

  🛑 Konica Minolta MFPs have a 64-character limit for form field values. If a value exceeds this limit, documents cannot be scanned.

- 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.

Chapter 2

System requirements

The primary source of information about supported devices and other Kofax TotalAgility requirements is the Technical Specifications document. The document is updated regularly, and we recommend that you review it carefully to ensure success with your Kofax Front Office Server product.

Support for single sign on

Kofax TotalAgility supports single sign on for users who are also registered users on the Konica Minolta 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 Konica Minolta MFP are set using the User Name property of the device. See the Konica Minolta documentation for instructions.

Konica Minolta MFPs also supports SafeQ SSO. To enable this feature, use this setting in the Devices app by selecting **Settings** > **Advanced**.

- Namespace: mfp.konica_minolta.properties
- Name: sso.activedirectory.domain
- Value: The domain associated with the authenticated MFP user.

A backslash (\) separates the domain from the user name for single sign-on, such as domain \username.

Preparing for registration

Before registering the MFP, do the following:

1. Install Kofax TotalAgility.
2. Download the Konica Minolta client software from Devices.
3. Configure Microsoft Internet Information Services (IIS).
4. Configure either WebDAV or an FTP server.
5. Set up a proxy server, if necessary.
6. Configure SSL on the MFP, if needed.

Configuring IIS

The OpenAPI application must be installed on IIS. You have the option of installing OpenAPI automatically with Kofax TotalAgility. If you did not select this option, you can install it manually as shown in this section. If the Web and application servers are installed on separate computers, OpenAPI must be installed on both. However, IIS configuration of the OpenAPI application is not necessary with Azure deployments of Kofax TotalAgility. For more information about installing OpenAPI, see the Microsoft documentation.

1. Run Internet Information Services (IIS) Manager.
2. On the Connections panel, expand the list for the Web server and sites until Default Web Site appears.
3. Right-click **Default Web Site** and select **Add Application**.
4. Complete the Add Application window as follows:

    a. Enter OpenAPI in the Alias field.

    b. Click **Select** to the right of the **Application pool** field.

    c. On the Select Application Pool window, select **ASP.NET v4.0** and click **OK**.

    d. In the **Physical path** field, click **...** and select the `OpenAPI` folder where Kofax TotalAgility is installed.

    By default, this folder is located at `C:\Program Files\Kofax\TotalAgility\OpenAPI`.

    e. Click **OK**.

    OpenAPI is added to the Default Web Site, which should also contain Kofax TotalAgility.

Receiving scanned images

Supported Konica Minolta MFPs use WebDAV to receive the scanned images. You can use FTP in environments where WebDAV cannot be used. Refer to the following sections to set up the WebDAV or FTP server to communicate with the MFP.

Configuring WebDAV settings

If you are using WebDAV and want to install the WebDAV Publishing feature and configure WebDAV to work with Kofax TotalAgility, follow the complete procedure. If the Web and application servers are installed on separate computers, WebDAV must be configured on the Web server.

If you want to use the existing WebDav server, start the procedure starting on step 5.

In Azure environments, Kofax TotalAgility needs to connect to the WebDAV server during processing. Configure the WebDAV server to be publicly accessible to allow access from the Azure environment.

1. In Server Manager, enable the WebDAV Publishing and Basic Authentication features of the Web Server Role.

    a. Expand the Roles list.
    Web Server (IIS) should be one of the items under Roles.

    b. Right-click Web Server (IIS) and select **Add Roles Services**.
    The Add Role Services window appears.

    c. Select **WebDAV Publishing** (under Common HTTP Features) and **Basic Authentication** (under Security).

    d. Click **Next**.

    e. After reviewing the list of components to be installed, click **Install**.

2. In Internet Information Services (IIS) Manager, add a new website. Complete the Add Web Site window as follows:

    a. In the **Site name** field, type ImageTransfer.

    b. In the **Application pool** field, click **Select** and select the TotalAgilityAppPool application pool.

    c. In the **Physical path** field, type the path to a folder where the user authenticated with the WebDAV website has read/write permissions. You can click **...** to select this path from a window.
    If you are using multiple WebDAV servers, make sure that the folder where images are stored is accessible to all WebDAV servers. For a clustered environment, select the same shared folder as the physical path on all nodes.

    d. Click **Connect As**. In the window that appears, select a user account or use a user for the application.

    e. In the Binding section, select the type of binding, IP address, and port.

> ℹ Select a port that is different from the default website. If you are using IIS for load balancing, specify the port number using PORT_IMAGETRANSFER as shown in the *Kofax TotalAgility Installation Guide*. At least one port of the IIS server must also contain a binding to the port specified with PORT_IMAGETRANSFER.

    f. Select **Start Web site immediately**.

    g. Click **OK**.
       The WebDAV website is created and started.

3. Create an authoring rule for the ImageTransfer website and enable WebDAV.

    a. In Internet Information Services (IIS) Manager, select the ImageTransfer website.

    b. On the ImageTransfer Home page, double-click **WebDAV Authoring Rules**.
       The WebDAV Authoring Rules page appears.

> ℹ If **WebDAV Authoring Rules** does not appear, restart IIS Manager.

    c. Click **Add Authoring Rule**.

    d. In the Add Authoring Rule window, select the following options:
- Under **Allow access to**, select **All content**.
- Under **Allow access to this content to**, select **Specified users** and enter the user name for the account that accesses the folder.
- Under **Permissions**, select **Read**, **Source**, and **Write**.

    e. Click **OK** to save the settings.

    f. Click **Enable WebDav**.

4. Select the ImageTransfer website again to set authentication.

    a. On the ImageTransfer Home page, double-click **Authentication**.
       The Authentication page appears.

    b. Set the authentication options:
- Enable Basic Authentication.
- Disable Anonymous Authentication.

5. Use a WebDAV program to verify access to the site created to store the images.

6. Run Devices. In the **Settings** - **Advanced** tab, set the following options in the mfp.konica_minolta.properties namespace.
- imagetransfer.method
- webdav.domain
- webdav.password
- webdav.path
- webdav.port
- webdav.protocol
- webdav.trust.all.certificates
- webdav.server

- webdav.username

Also set the following options in the kfs.properties namespace:
- ProxyServer
- ProxyServerPath
- ProxyServerPort or ProxyServerSecurePort
- ProxyServerProtocol
- UseProxyServerProtocol

See the Devices Help for instructions.

7. Enable chunk transmission on the MFP. Follow these general steps. (See the documentation provided with the device for more details.)

    a. Press the **Utility/Counter** button on the front panel.

    b. Press **Administrator Settings**.

    c. Enter the user name and password for an administrator of the device and press **OK**.

    d. Press **Network Settings**.

    e. Press **WebDAV Settings**.

    f. Press **WebDAV Client Settings**.

    g. For the **Chunk Transmission** setting, select **Yes**.

    h. Press **OK**.
       The setting is saved.

Configuring the FTP server settings

If you are using FTP server, configure it as follows.
- Host name or IP address.
- Folder name on the FTP server where the images will be transferred.
- Credentials (user name and password) of the FTP user. Be sure that the FTP user has full rights to the transfer folder.

In Azure environments, Kofax TotalAgility needs to connect to the FTP server during processing. Configure the FTP server to be publicly accessible to allow access from the Azure environment.

1. In Devices on the **Settings** - **Advanced** tab, locate the mfp.konica_minolta.properties namespace.
2. Specify the following FTP connection information. The descriptions provide instructions.
    - ftp.server.address
    - ftp.server.port
    - ftp.server.upload.folder
    - ftp.server.username
    - ftp.server.password
    - imagetransfer.method

The remainder of the FTP properties have default values that you can customize by following the instructions in the descriptions.

3. Save your changes.

Changing FTP servers

To change FTP servers, change the settings in the mfp.konica_minolta.properties namespace. You do not have to restart Kofax TotalAgility. The changes are made at the next polling interval.

Proxy server connection

When you set up your connection to the proxy server, follow these requirements:

- Use sticky sessions.
- If using IIS, on the Server Affinity settings window, select the "Use host name" check box.
- If using an NLB cluster, select Single as the default Affinity setting for your port rules.

SSL configuration

If you are using SSL, make sure that a valid server certificate is installed on the MFP. Your certificate must use a strong encryption key. See the documentation for your device for instructions.

Chapter 4

Registering the MFP with Kofax TotalAgility

Before registering Kofax TotalAgility with the MFP, do the following:
- Install Kofax TotalAgility.
- Download the Konica Minolta client software from Devices to your computer.
- Make sure that all Konica Minolta MFPs connected to the same Kofax TotalAgility have the same user name and password.

Run the client registration program, KofaxKonicaMinoltaRegistration.exe, from any Windows computer on or outside the network where the MFP is located. The program registers the Kofax TotalAgility application on the MFP and provides the URL so the MFP can make the initial call to the Kofax TotalAgility when the client software is started on the MFP.

To register a Kofax TotalAgility or to connect to a different Kofax TotalAgility, do the following.

1. Go to `registration` in the folder where you downloaded and extracted the client software, and run KofaxKonicaMinoltaRegistration.exe.
   The **Konica Minolta Registration Client** window appears.

   > ℹ️ Follow the instructions in Registering with a different Kofax TotalAgility installation to register the MFP with a different Kofax TotalAgility.

2. In the **Device Connection** section, provide information for the MFPs you are registering, including the host name or IP and the administrator user name and password for the MFP. To register multiple MFPs at one time, use one of the following options.

   > ❗ To register multiple MFPs, the administrator credentials must be the same on every MFP. If the MFP has OpenAPI authentication enabled, type the login ID and password. If OpenAPI authentication is disabled, leave these fields blank.

   - Enter MFP host names or IP addresses separated by commas into the **MFP Host Names or IP Addresses (comma separated)** 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. The registration program registers each MFP in order until all of the ones listed in the file are registered.

3. Register the server as follows:

   a. In the **Server IP Address** field, enter the Kofax TotalAgility IP address or host name of the server.

   b. To verify that the IP address or host name is correct, click **Test**.

   A window indicates whether the connection is successful or not. Click **OK** to close the window.

   c. To use a secure connection, select **Use SSL**.

   If **Use SSL** is not selected, HTTP will be configured on the MFP when the registration connection is made.

   d. Enter the port number in the **Server Port** field.

   e. Click **Register**.

   When the registration process is completed, the **Registration Results** window lists successful deployments as well as any errors encountered. Right-click and copy the selected items or all failed items to the clipboard.

4. When you are finished with the **Registration Results** window, click **OK** and close the client registration program.

Registering with a different Kofax TotalAgility installation

1. Go to `registration` in the folder where you downloaded and extracted the client software, and run KofaxKonicaMinoltaRegistration.exe.
   The **Konica Minolta Registration Client** window appears.
2. Verify that the **Device Connection** section contains the information for the MFP you want to register.
3. Click **Unregister**.
4. Complete the **Registration** section with the new information and click **Register**.
5. When you receive the successful activation message, close the client registration program.

The MFP is now ready to use with Kofax TotalAgility. The Kofax button appears on the network scanner main menu. Depending on 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 Devices Help for information about self-registration and default device profiles.

> ⓘ If other applications are installed, the button is labeled as APP instead of Kofax. In this case, press the APP button to view a list that includes Kofax.

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.

Controlling log on options

Kofax TotalAgility supports configuring log on options for Konica Minolta MFPs. On the Settings - Advanced tab in Devices, edit the following properties in the mfp.konica_minolta.properties namespace.

- To configure the default log on option, edit the property default.user.auth.option.

  To select No Authentication, set the property to 1.

  To select Authentication, set the property to 2.

- To configure whether log on is required, edit the property require.user.auth.

  To require authentication, set the property to 1.

  To not require authentication, set the property to 2.

- To configure the Konica Minolta MFP to use SafeQ single-sign-on, edit the sso.activedirectory.domain setting

  Enter the domain name associated with authenticated MFP users. Single-sign-on will append a backslash and the user name when authenticating users. If you enter companydomain1 for the sso.activedirectory.domain setting, the complete user name will be companydomain1\username.

Options for sending jobs

If you want to be prompted before sending a job, which also gives you the option of adding pages to a job before sending it, enable the Separate Scan option. On the MFP, go to the Scan Settings page and select **Separate Scan**. If Separate Scan is not enabled, jobs are sent from Konica Minolta MFPs immediately after the last page of a document is scanned.

Set the page size and duplex settings for Konica Minolta MFP through the device's scan setting window before scanning. These settings are not passed during the scan. In the Scan/VRS Profile settings in TotalAgility Designer, the Duplex and Paper Size fields are not supported.

Enabling logging

You can configure Kofax TotalAgility to log communication between itself and the MFP. To enable logging, modify web.config to enable the EnableOpenAPILog setting.

1. Locate web.config in the `Agility.Server.Web\Kofax\KFS` folder where Kofax TotalAgility is installed.

2. Open web.config in a text editor and locate a line similar to the following:

```
<KfsSettings ParentSite="" PingInterval="10"
 ProxyConnectionTimeoutMilliseconds="600000" EnableOpenAPILog="false"/>
```

3. Change the EnableOpenAPILog setting to true as follows:

```
<KfsSettings ParentSite="" PingInterval="10"
 ProxyConnectionTimeoutMilliseconds="600000" EnableOpenAPILog="true"/>
```

4. Save the file.

5. Repeat steps 1–4 for each app and web server.

6. Restart the server services on all of the app and web servers.

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.

Optimizing scan settings

Kofax TotalAgility supports the configuration of several scan settings for the Konica Minolta MFPs.

> ⓘ For IT4 and earlier devices, duplex and paper size scanning cannot be configured from the server. Use the front panel to set duplex scanning and paper size instead.

1. In Devices on the **Settings** - **Advanced** tab, locate the mfp.konica_minolta.properties namespace.

2. Specify the scan settings as needed, and see the Description column for instructions.

3. Save your changes: you do not have to restart Kofax TotalAgility for the changes to take effect.

Viewing fields on the MFP front panel

On a Konica Minolta MFP, you can view up to 18 fields at a time on the front panel. To navigate through the fields:

- Use the Up and Down arrows to move from one field to another within a group of fields.
- Use the buttons at the end of a group of fields to move from one group to another.

Scanning on A4 devices

On Konica Minolta A4 devices, only portrait mode scanning is supported (up to A4 sheet size). If a scanned textual document has a landscape orientation, auto-rotate image processing should be used to correct the document orientation.

Open API web application set up

The Konica Minolta MFP client requires OpenAPI to be installed on the TotalAgility web server. Before building a TotalAgility web server container image, edit the `<working directory>` `\ContainerFiles\PowerShellScripts\ConfigureContainer.ps1` file and add the following line to the end:

```
New-WebApplication -Name OpenAPI -Site 'Default
Web Site' -PhysicalPath '<TotalAgility Install Directory>\OpenAPI'
-ApplicationPool DefaultAppPool
```

By default, the command looks like this:

```
New-WebApplication -Name OpenAPI -Site 'Default
Web Site' -PhysicalPath 'C:\Program
Files\Kofax\TotalAgility\OpenAPI' -ApplicationPool
DefaultAppPool
```

Help for the MFP functions

On the touch screen, press Help by pressing the Help button. However, some screens, such as the screen that appears when performing a search, do not have a Help button. Performing a search requires you to end the search string with a question mark, but the Help that provides that instruction is accessed from the front panel Help button.

To help you understand the instructions for various functions, a copy of the MFP Help follows.

Starting the client software

Log on to the MFP with your user name and password and press **Login**. Press Kofax to start the client software.

Using the main menu

Use the Main Menu to scan and send a document.
- If available, press **Log On** to log on before scanning, which enables you to send documents with a group shortcut.
- If available, press a shortcut to send a document. When prompted, enter any information needed.
- If you are logged on, press **Log Off** to log off as a user.
- Press **Exit** to exit the client software.

  ⓘ Make sure your documents are loaded before scanning.

Nested categories

Categories can be nested up to 10 levels. A maximum number of 100 shortcuts can be displayed. Use the category buttons as follows:
- Press a category, which is enclosed in brackets ([ ]), to go to the shortcuts in that category.
- Press **Shortcuts** to go to the shortcut list.
- Press **Cancel** to return to the previous screen.

Completing and looking up index fields

An asterisk (*) indicates a required field, and you cannot scan until all required fields are completed. An "at" sign (@) in front of the field name means you can perform a search.

Searching

1. Press the field button to display the on-screen keyboard.
2. Type a search string, end with a question mark (for example: ma?) and then press **OK**.
3. Press **Start** to connect with the server and retrieve the results.
4. Press **OK** on the message about refreshing the display.
5. Press **Refresh**, and then press the lookup field button again.
6. Select one or more of the displayed values and click **OK**. The field is filled with your selections.

Logging on

Press the **User Name** box to display an on-screen keyboard for entering your user name. Press the **Password** box to display an on-screen keyboard for entering your password. Press the **Login** button to log on with the entered user name and password. Press **Cancel** to exit the screen without logging on.