



# Kofax eFlow Administrators User's Guide

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**KOFAX**

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# Table of Contents

<b>Preface</b> .....	<b>4</b>
Product documentation.....	4
Open Administrate.....	5
Manage licenses.....	6
Request a license.....	7
Install a license.....	7
Activate a license.....	9
Activate online.....	10
Activate by file.....	10
Deactivate a license.....	11
Deactivate online.....	11
Deactivate by file.....	11
Uninstall a license.....	12
Reinstall a license.....	12
Manage applications.....	13
Add an application.....	14
Copy an application.....	15
Export an application.....	15
Delete an application.....	15
Stop and restart an application.....	15
Prevent or allow new logins.....	16
Export the applications list.....	16
Manage autorun stations.....	17
Add an autorun station.....	17
Remove an autorun station.....	18
Export and import the Autorun Stations list.....	18
Generate statistics.....	19
Statistics settings.....	19
Cleanup Settings.....	21
View file versions.....	21

# Preface

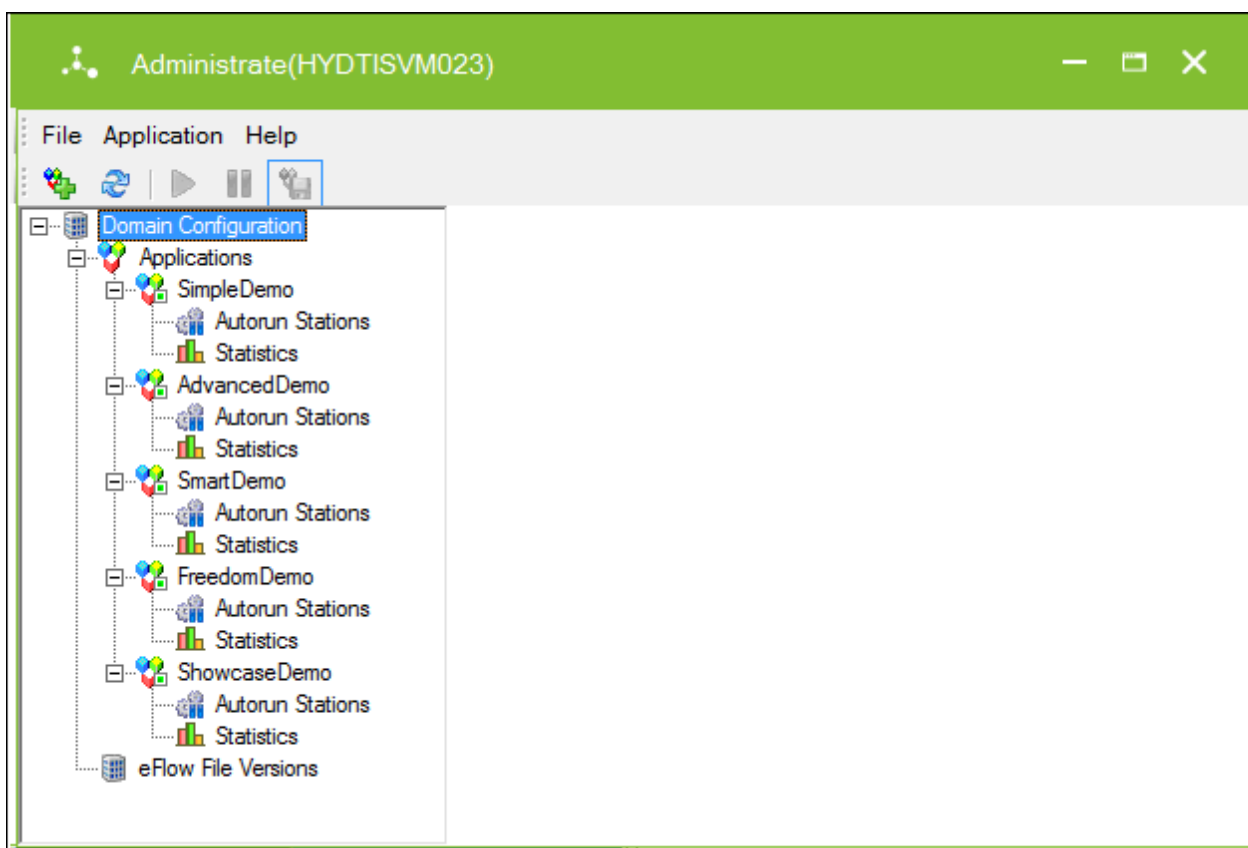
The Kofax eFlow Administrate module enables you to manage your eFlow licenses, applications, autorun stations and generate statistics. In this module you can install and uninstall licenses, create and delete applications, and add and remove autorun stations as per your requirements.

## Product documentation

To access the full Kofax eFlow documentation set online, see the [Kofax eFlow Product Documentation page](#). For a complete set of Kofax eFlow documents, refer to the Kofax eFlow Release Notes.

# Open Administrate

To open the **Administrate** module, in the **eFlow LaunchPro**, select **Administrate** from the **Tools** list.

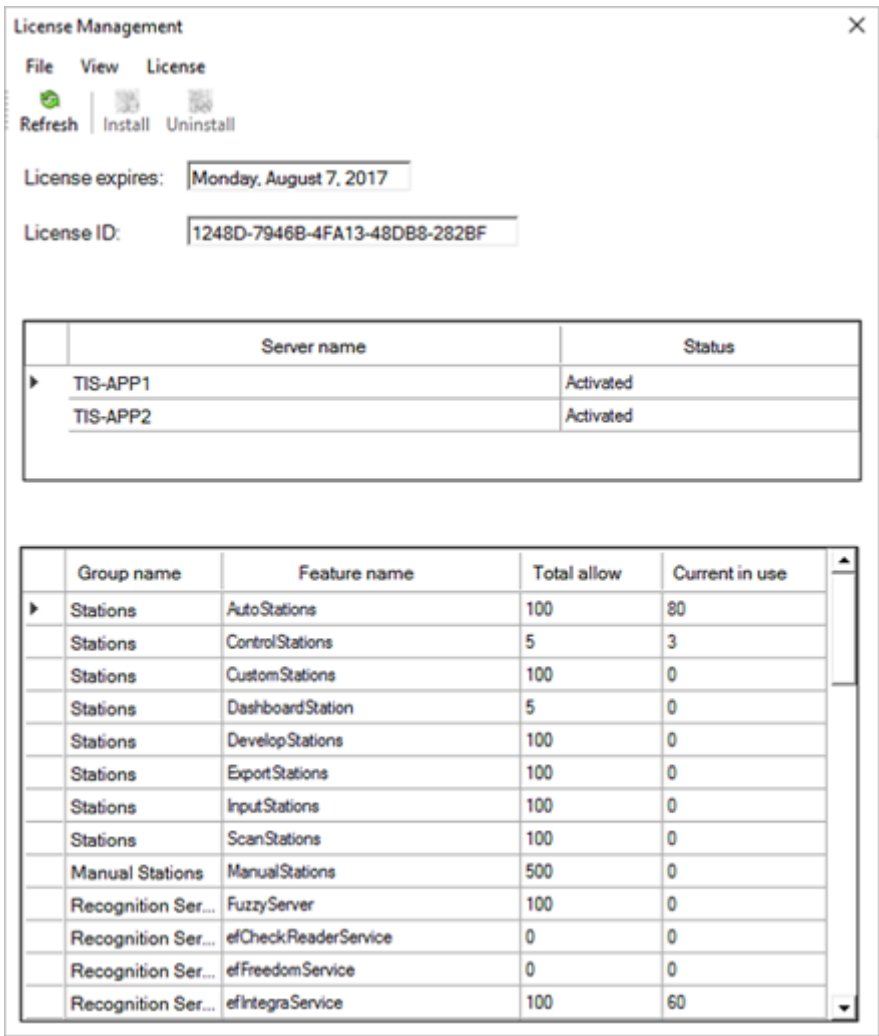


# Manage licenses

To view and manage your eFlow licenses, right-click the **Domain Configuration** node and select **License**.

The **License Management** dialog box lists the number of available licenses and the number of licenses currently in use for each eFlow server in the domain.

Refer to the "eFlow licensing" chapter in the *Kofax eFlow Configuration Guide* for detailed information on the licensing mechanism.



## Request a license

Customers and partners should contact their Kofax representative to request a license.

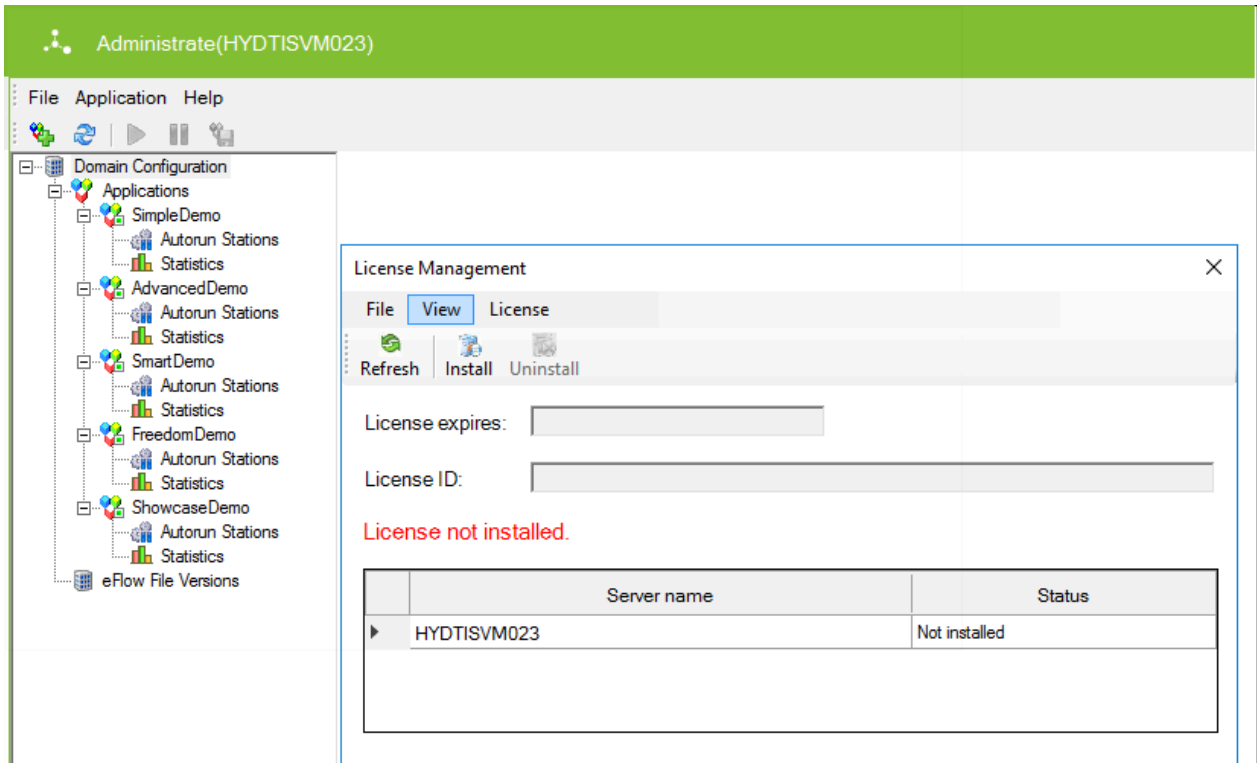
You must install and activate the new license.

## Install a license

After you receive a license from Kofax, you can install it. Perform the following steps to install the license.

1. Right-click **Domain Configuration** and select **License**.  
The **License Management** dialog box appears.

2. Click **Install**, navigate to the location where the license is stored, and then select the license file.



After the license installation, the **License Management** dialog box displays all available eFlow servers with the status **Not activated**. Every eFlow license is fully functional for seven days after its creation. To continue working beyond the trial period, you must activate the license.



License Management
✕

File View License

Refresh Install Uninstall

License expires:

License ID:

Your activation period has expired and at least one server has not been activated.

	Server name	Status
▶	HYDTISVM023	Activation period expired

	Group name	Feature name	Total allow	Current in use
▶	Stations	AutoStations	99	0
	Stations	ControlStations	10	0
	Stations	CustomStations	99	0
	Stations	DashboardStation	10	0
	Stations	DevelopStations	99	0
	Stations	ExportStations	10	0
	Stations	InputStations	10	0

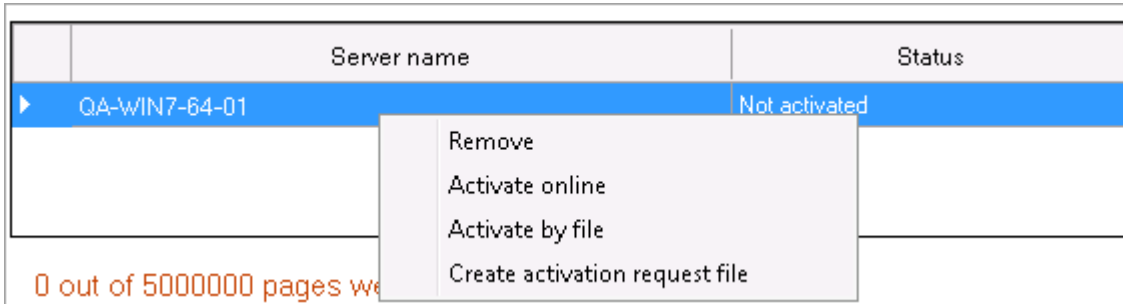
## Activate a license

A new license is fully functional for seven days following its creation. After that, you must activate the installed license. During the license activation, the eFlow servers that belong to the current license are registered on the License server.

After successful activation, the **License Management** dialog box displays information about the installed license and active eFlow servers. The expiration date is set as defined in the license.

**i** In a multi-server configuration, repeat the activation procedure for each eFlow server.

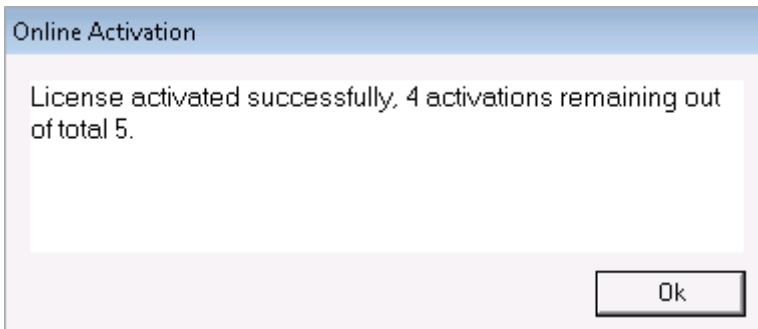
To activate a license, in the **License Management** dialog box, under **Server name**, select the server, and then from the **License** menu select one of the activation methods.



## Activate online

We recommend using online activation if an Internet connection is available. This is the most simple and straightforward method.

Allow about half a minute for the procedure to complete. A dialog box displays the results of the activation attempt.



## Activate by file

Offline activation is done via e-mail communication, as shown below.



1. Select the **Create activation request file** menu item to create an activation request file (.TIS\_ACT\_REQ).
2. Send the newly created activation request file to the automatic license activation e-mail address: [eFlowActivation@kofax.com](mailto:eFlowActivation@kofax.com).

You will receive a reply that contains the license activation file (.TIS\_ACT). Save this file to use later during the activation.

3. From the **License** menu, select **Activate by file**.
4. Open the saved activation file.

## Deactivate a license

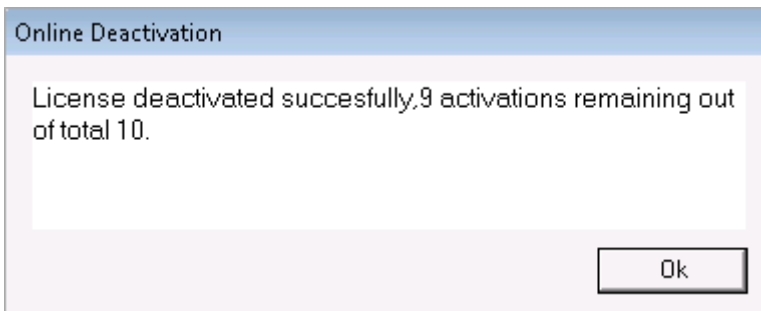
License deactivation is required under the following circumstances:

- One of the eFlow server machines will be replaced.  
An active eFlow server must be deactivated before removing it.  
As the activations number is limited per license, failure to deactivate a license will not free the activation in use. If the license has reached its limit, further activations will be refused.
- The eFlow license must be uninstalled.  
Once all the servers are deactivated, the license can be uninstalled and reused if necessary.

### Deactivate online

If an Internet connection is available, it is recommended to perform the online deactivation by selecting **Deactivate Online** from the **License** menu.

The process may take few seconds, at the end of which a message appears which shows the remaining activation for the license.



### Deactivate by file




1. In the absence of an Internet connection, you must select **Create deactivation request file** from the **License** menu. This command will deactivate the server locally and create the deactivation request file.

2. To finish the deactivation procedure, send the deactivation request by email to the automatic license address: [eFlowActivation@kofax.com](mailto:eFlowActivation@kofax.com)

You will receive a reply from above email address containing a confirmation that the deactivation has been registered successfully.

## Uninstall a license

In the **License Management** dialog box, click **Uninstall**.

 The **Uninstall** button is not available for active licenses. You must deactivate a license before you uninstall it.

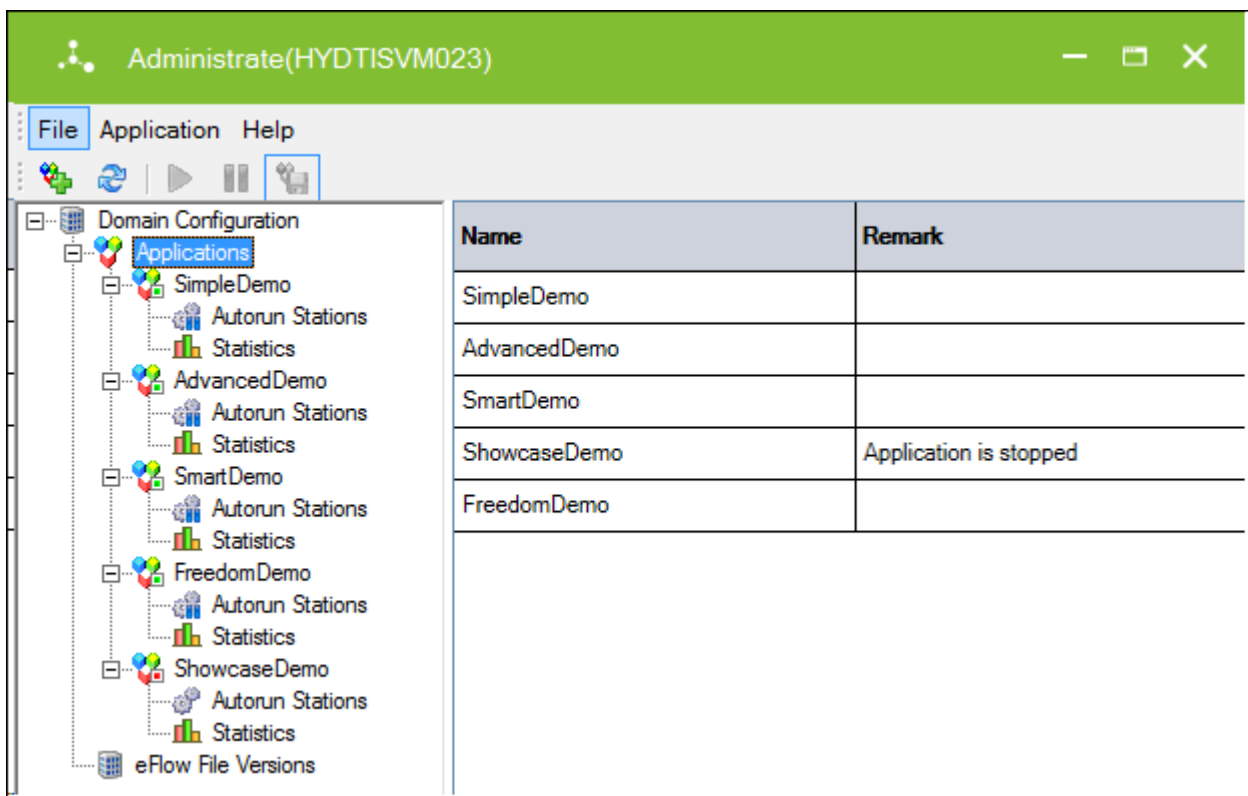
## Reinstall a license

1. Deactivate and uninstall the existing license.
2. Install a new license or reinstall the old one.

# Manage applications

eFlow applications are configured in the eFlow Design module; but you cannot create, start or stop an application in the eFlow Design module. To create a new application, or to make an existing application available in the **eFlow Launch** and **eFlow LaunchPro**, you must add the application in the **Administrate** module.

To view all applications available in the domain, click on or expand the **Applications** node. The **Remarks** column displays system messages.





The screenshot shows the Administrate(HYDTISVM023) application window. The left pane displays a tree view under 'Domain Configuration' with the 'Applications' node expanded. The right pane shows a table with two columns: 'Name' and 'Remark'.

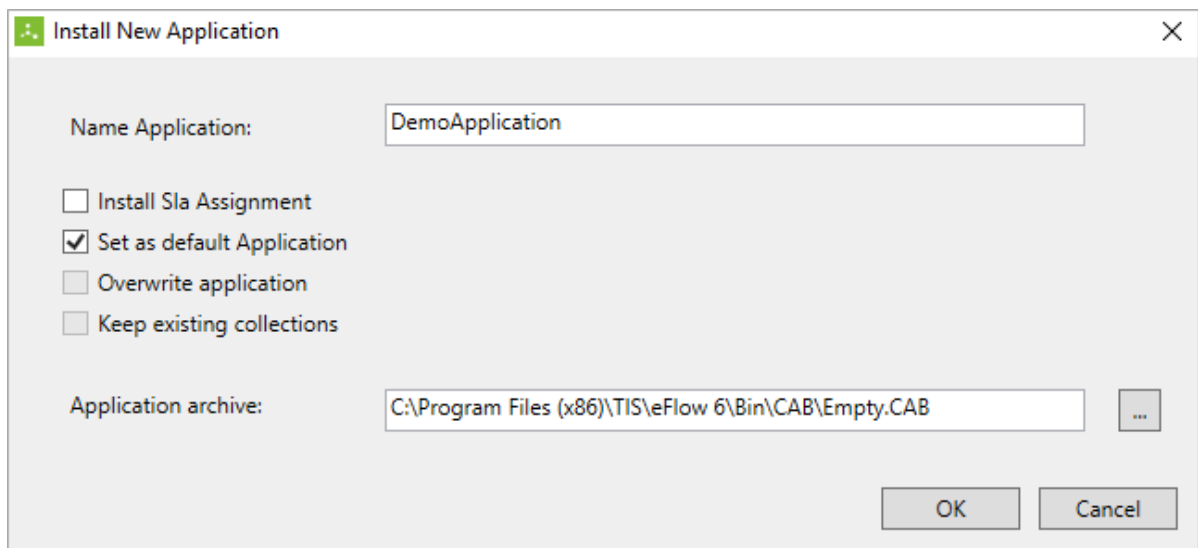
Name	Remark
SimpleDemo	
AdvancedDemo	
SmartDemo	
ShowcaseDemo	Application is stopped
FreedomDemo	

## Add an application

The following procedure details how to create an application in Administrate module.

1. Click **New Application** .
2. In the **Install New Application** dialog box, type a name for the application.
3. In the **Application archive** field, type the name of the application CAB file, or click **Browse**  to search for the file. If you are creating a new application, select the Empty.CAB file in the following folder.

C:\Program Files (x86)\TIS\eFlow 6\Bin\CAB



4. Optional. Select the following options.

Option	Description
Install SLA Assignment	Select this option to install the SLA assignments defined for the application in the eFlow Supervise module. Refer to the <i>Kofax eFlow Supervise User Guide</i> for information on SLA assignments.
Set as default Application	Select this option to set this application as the default application. The default application is automatically selected when users start <b>eFlow Launch</b> and <b>eFlow LaunchPro</b> .
Overwrite application	This option is only available if you enter the name of an application that already exists in Administrate. Select this option to confirm that you want to overwrite the existing application; otherwise, you cannot save the new application. If you do not want to overwrite the existing application, enter a different name in the <b>Name Application</b> field.
Keep existing collections	This option is only available if you enter the name of an application that already exists in Administrate. If you choose to overwrite an existing application, select this option to retain all collections currently in that application.

5. Click **OK**.

## Copy an application

You can copy an application in Administrative and then make changes to the copy in the eFlow Design module.

1. Right-click the application and select **Duplicate**.
2. In the **Duplicate application wizard** dialog box, enter a name for the application.
3. Optional. Select the following options.

Option	Description
Set as default Application	Select this option to set this application as the default application. The default application is automatically selected when users start <b>eFlow Launch</b> and <b>eFlow LaunchPro</b> .
Duplicate users security info	Select this option to copy the user security settings of the application. Security settings specify which operator workstations, services, and roles are accessible throughout the application and are defined in the Design module.


4. Click **OK**.

## Export an application

You can export the CAB file of an application, for example, you may want to install it in another system or environment.

1. Right-click the application and select **Export**.
2. Browse to the folder where the CAB file should be saved, then click the **Save** button.

## Delete an application

 Deleting an application is an irreversible procedure. It removes everything from the system that is related to the application, including the CAB file, collections, folders on the server and clients, and databases.



1. Right-click the application and select **Delete**.
2. Click **Yes** when prompted to confirm the deletion.

## Stop and restart an application

Occasionally you may want to stop an application, for maintenance, testing or another purpose. Stopped applications are not available in **eFlow Launch** and **eFlow LaunchPro** and it is not possible to run the stations.

**i** Before stopping an application, make sure that there are no collections in the application, and log out of all the application's stations using the Control module. If you use autorun stations, disable autorun first (see [Manage autorun stations](#)).

To stop an application, right-click the application and select **Stop**.

The application icon changes from green  to red  to indicate that the application has been stopped.



To restart the application, right-click the application and select **Start**.

## Prevent or allow new logins

You can prevent additional users from logging in to manual stations, such as to prevent poor system performance when system resources are overloaded. Users currently working with the application are not affected by this action.

To prevent new logins to the application, right-click the application and select **Lockout Logins**.

To allow new logins again, right-click the application and select **Allow New Logins**.

## Export the applications list

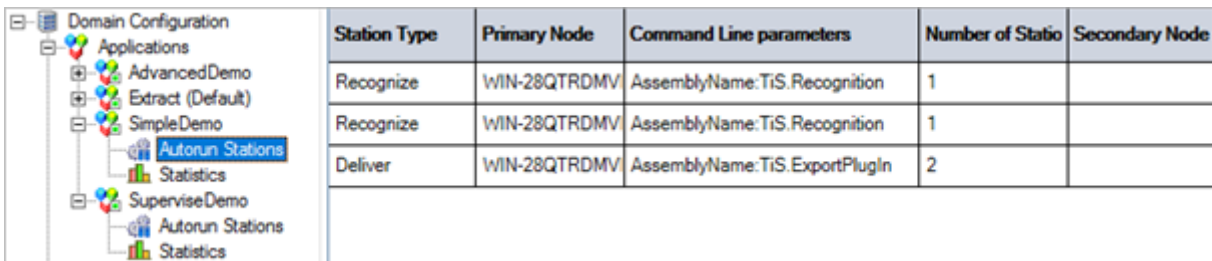
To export the list of applications to a text file, right-click the **Applications** node and select **Export applications list**.



# Manage autorun stations

To run a station automatically, you must select the **StandBy** and **Allow Unattended** parameters in the Workflow Designer of Design module.

You can add additional instances of autorun stations to the application to distribute the load and speed up processing.

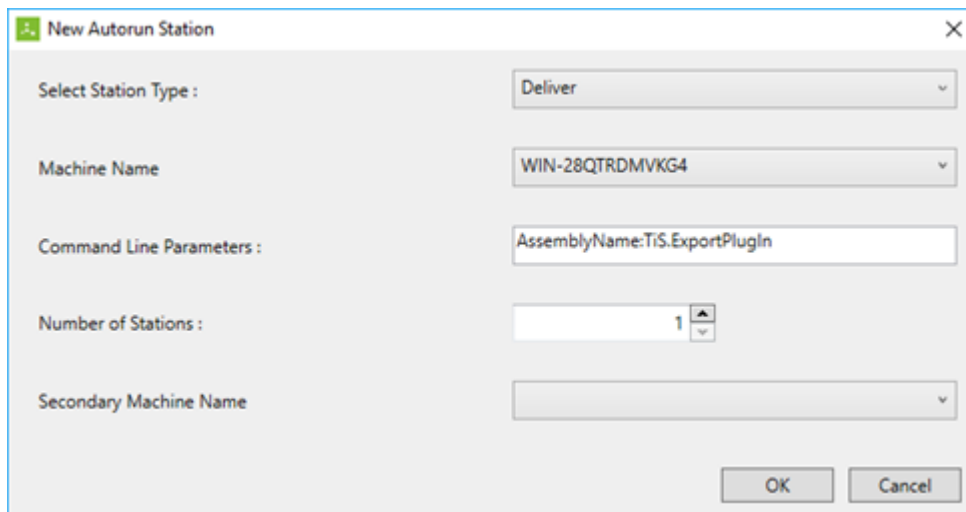


The image shows a screenshot of the 'Domain Configuration' tree on the left, with 'SimpleDemo' expanded to show 'Autorun Stations'. To the right is a table listing the configured autorun stations.

Station Type	Primary Node	Command Line parameters	Number of Station	Secondary Node
Recognize	WIN-28QTRDMV	AssemblyName:TiS.Recognition	1	
Recognize	WIN-28QTRDMV	AssemblyName:TiS.Recognition	1	
Deliver	WIN-28QTRDMV	AssemblyName:TiS.ExportPlugIn	2	

## Add an autorun station

1. Right-click the **Autorun Stations** node and select **Add Autorun Station**.
2. In the **New Autorun Station** dialog box, select the station type and the machine on which the station should run.



The image shows a screenshot of the 'New Autorun Station' dialog box. The fields are filled with the following values:

- Select Station Type: Deliver
- Machine Name: WIN-28QTRDMVKG4
- Command Line Parameters: AssemblyName:TiS.ExportPlugIn
- Number of Stations: 1
- Secondary Machine Name: (empty)

Buttons for 'OK' and 'Cancel' are visible at the bottom right.

3. Optional (for advanced users only). Enter any command line parameters you want to use. These command line parameters are defined in the Design module.
4. Select the number of stations to run.
5. Optional. Select a secondary machine name. The specified number of station instances will run on this machine if there is a problem with the primary machine.
6. Click **OK**.
7. Right-click the **Autorun Stations** node and select **Enable Autorun**.

## Remove an autorun station

1. If autorun is enabled, right-click the **Autorun Stations** node and select **Disable Autorun**.
2. In the **Autorun Stations** list, select the stations you want to remove.
3. Right-click and select **Remove selected stations**.

## Export and import the Autorun Stations list

The autorun stations configuration is not preserved when you update an application, so it is advisable to export the configuration to a file before updating and then import the file after the update.

To export the list of autorun stations to a text file, right-click the **Applications** node and select **Export Autorun Stations list**.


To import an autorun stations list, right-click the **Applications** node and select **Import Autorun Stations list**, then navigate to and select the text file.

# Generate statistics

You can generate statistics for an application and view them in a statistics reporting tool of your choice. The generated statistics are stored in a Microsoft SQL database. For detailed information on the Statistics database, refer to the "Statistics database" section in *Kofax eFlow Configuration Guide*.

To generate statistics, click on the **Statistics** node, then enter and save the [settings](#).

The **Remarks** column displays system messages.

 You cannot configure statistics generation if the application is stopped (see [Stop and start an application](#)).

## Statistics settings

1. Select the **Enable statistics** check box.

Statistics settings		Cleanup Settings
<input checked="" type="checkbox"/> Enable statistics		
Select Statistics Data Storage Type		MSSQLStorage
<b>DBConnectionString</b>		
DatabaseName	SimpleDemo_Statistics	
IntegratedSecurity	<input type="checkbox"/>	
Password	**	
ServerName		
UserName	sa	
<b>Statistics Type</b>		<b>Remark</b>
<input checked="" type="checkbox"/>	ManualFormId	
<input checked="" type="checkbox"/>	Operator Counters	***
<input checked="" type="checkbox"/>	DataEntry	
<input checked="" type="checkbox"/>	Operator Counters	***
<input checked="" type="checkbox"/>	Forms	***
<input checked="" type="checkbox"/>	Fields	***
<input checked="" type="checkbox"/>	Compare	
<input checked="" type="checkbox"/>	Fields	***
<input checked="" type="checkbox"/>	CollectionAudit	
<input checked="" type="checkbox"/>	Collection Audit	***
<input checked="" type="checkbox"/>	SessionsAudit	
<input checked="" type="checkbox"/>	Login/Logout	***

- In the **DBConnection string** section, type a name for the statistics database, and provide details of the connection to your SQL server. The database is created on this server. To use domain authentication, select the **IntegratedSecurity** check box. When selected, the user running eFlow does not have to provide a password; the credentials of the user that runs the process are used, such as the TISApp pool user.
- In the **Statistics Type** area, select the appropriate check boxes for each type of statistics that you want to generate.

Statistics type	Description
ManualFormId	Statistics related to the eFlow Organize station, such as the number of forms and pages processed by operators within a given time.

Statistics type	Description
DataEntry	Statistics related to the eFlow Validate and Escalate stations, such as the number of modified or typed fields or the number of forms learned by operators within a given time. Refer to the <i>Kofax eFlow Validate User Guide</i> for more information on the Validate station. Select the appropriate check box to generate statistics related to <b>Operators, Fields, or Forms</b> .
Compare	Statistics comparing the original value of fields (usually the value just after OCR) and the final value (value during export).
CollectionAudit	Statistics related to the flow of collections through the system. Each lock, unlock, split, merge, and stream of data from server to client and from client to server is logged.
SessionsAudit	Statistics related to the usage of stations, such as login and logout times.

## Cleanup Settings

You can automatically remove statistics data from the database that is older than a specified number of days, or manually remove the data at any time.

To automatically remove statistics data, in the **Purge statistics data older than** field, enter the number of days, then click **Save settings**.

To manually remove statistics data, enter the number of days, then click the **Cleanup statistics now** button.

## View file versions

To view file versions, click on the **eFlow File Versions** node. This table displays the version, creation date and file size of all files in the eFlow Bin folder.