Kofax eFlow
Client Installation Guide

Version: 6.1.0

Date: 2023-08-29

KOFAX

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Preface

This guide details information about how to install Kofax eFlow 6.1.0 on a client machine:

- Instructions for downloading eFlow installation package.
- Instructions for checking the communication with the eFlow server.
- Information about post prerequisites validations failure.

Product documentation

To access the full Kofax eFlow documentation set online, see the Kofax eFlow Product Documentation page. If the security policy for your organization restricts Internet access, you can access the Kofax eFlow documentation offline. See Offline mode.

Full documentation set

The complete set of Kofax eFlow documentation is included in the following table.

Document	Description
Administrate User's Guide	Details information about how to create en eFlow application, manage eFlow licenses, applications, autorun stations, and generate statistics.
Analyze Recognition User's Guide	Details how to prepare, open analyze recognition, setup, analysis, save, load, remove and compare analysis results.
Client Installation Guide	Provides instructions for installing the Kofax eFlow platform on a client machine and testing the connection from the client machine to the server machine.
Collect User's Guide	Describes the collect station, how to import a collection in the eFlow system, configuration of collections, image enhancement, and optimizing performance.
Configuration Guide	Details information including how to configure eFlow for specific requirements, security mechanisms, recognition, and troubleshooting of common eFlow configuration issues.
Control User's Guide	Describes how to monitor collections through different views and tables, show collections' status at different stations, work with collections, and configure control.
Deliver2ERP User's Guide	Explains Deliver2ERP, and how to import and export a configuration, including the one for SAP. General settings are also described.

Document	Description
Design Free User's Guide	Provides information on how to get started; explains the components of the Design free desktop, global settings, databases, group, fields, tables, and set confidence level.
Design Smart User's Guide	Describes the components of Design Smart desktop; how to create a classification model, analyze classification results, tune a smart model, and the configuration parameters.
Design User's Guide	Explains how to use the eFlow Design module to create, set up, configure, customize, and edit applications for the Kofax system.
Installation Guide	Provides instructions for installing the Kofax eFlow platform in both a standalone and client/server environment. Instructions for Web station installation and OCR installation are also included in this guide.
Layout Designer User's Guide	Details the Layout Designer desktop components and explains how to work with layouts and add controls to layouts. Also describes common scenarios, templates, and themes.
Organize User's Guide	Details the components of the Organize desktop; also describes how to arrange pages and forms, and work with collections, forms, and pages.
Scan User's Guide	Describes scanner configuration and operation, along with image enhancements and filters.
Supervise User's Guide	Provides information about supervise settings, SLA management, different views that a supervisor can use, and tutorials about managing system performance.
Release Notes	Details the list of newly added features, resolved issues, known issues, and changes made since the previous release.
Technical Specifications	Describes the prerequisites including hardware, software, and third-party technologies to ensure proper functionality of the Kofax eFlow application.
Validate User's Guide	Describes how to work with a validate station that includes how to select different layouts, editing modes, and navigation shortcuts organizing a form.
Web Scan User's Guide	Describes how to log in to a Web Scan station using a web browser, scanner settings, basic scanning procedures, and advanced scan commands.
Web Stations Installation Guide	Describes eFlow Web stations and how to install them, along with configuration, customization, and troubleshooting information.
Web Validate User's Guide	Describes how to log in to a Web Validate station using a web browser, navigation, and how to work with collections, tables, and lookup tables.

Offline mode

To make the documentation available for use in offline mode, obtain the documentation files from the Kofax eFlow product package that you downloaded from the Kofax Fulfillment Site. The file you need is KofaxeFlowDocumentation_6.1.0_EN.zip.

1. Extract the contents of KofaxeFlowDocumentation_6.1.0_EN.zip to a folder on your computer.
2. Copy the folder to a location that is accessible while you are working with Kofax eFlow.

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.

Training

Kofax offers both classroom and online training to help you make the most of your product. To learn more about training courses and schedules, visit the Kofax Education Portal on the Kofax website.

Download the eFlow installation package

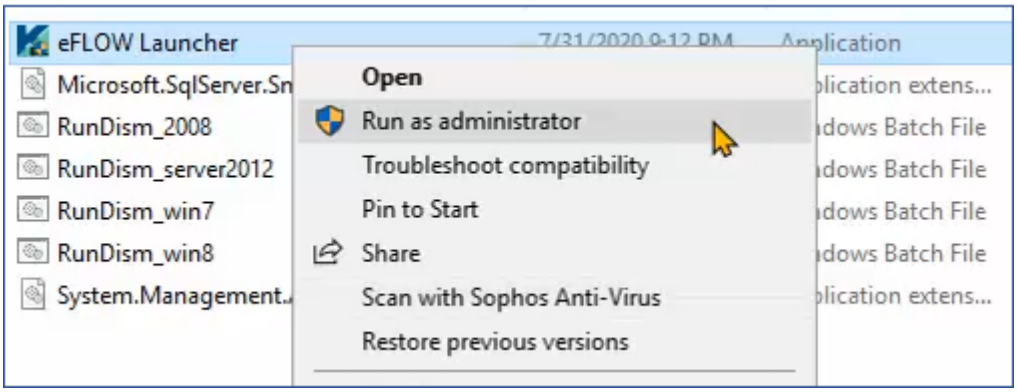
You can download the eFlow installation package from Kofax Fulfillment site.

Download and upzip the installation package on your computer.

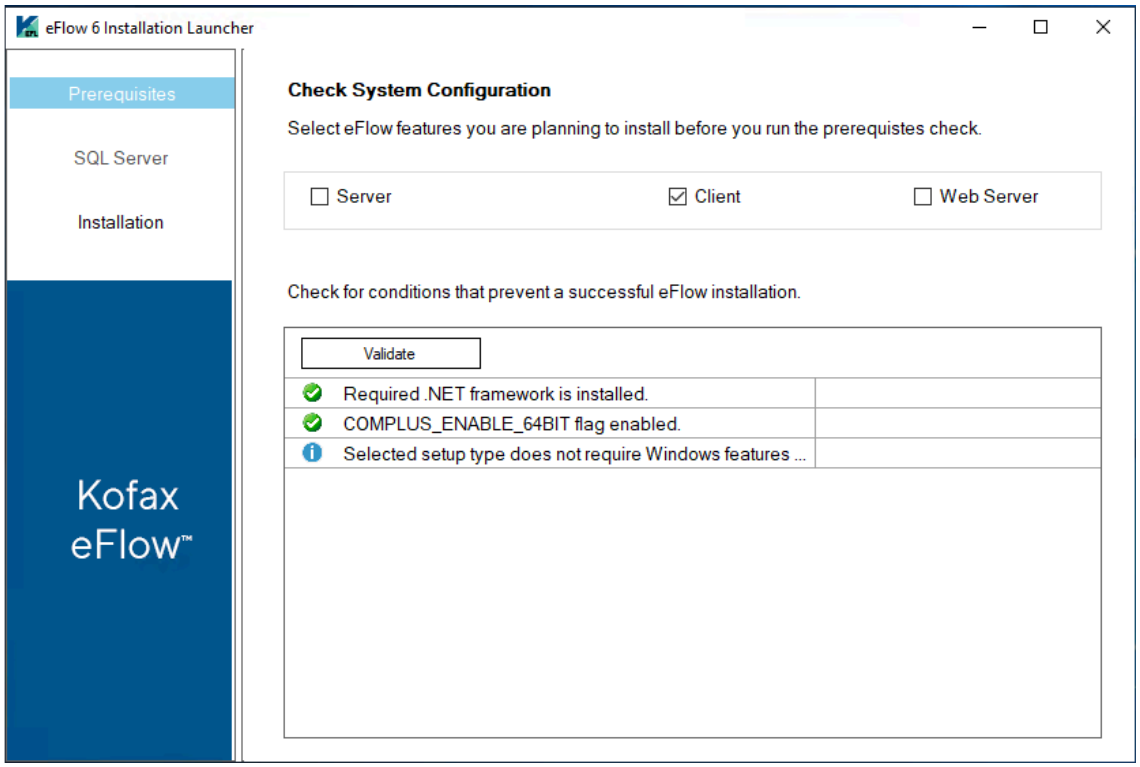
Run the eFlow Installation Launcher

The eFlow Installation Launcher helps to avoid installation errors. It clearly defines the installation steps and checks the eFlow software prerequisites configuration before starting the eFlow Platform installation. You can install missing prerequisites directly from the Launcher.

1. In the eFlow installation folder, open the Installation Launcher folder.
2. Right-click eFlow Launcher.exe and select **Run as administrator**.

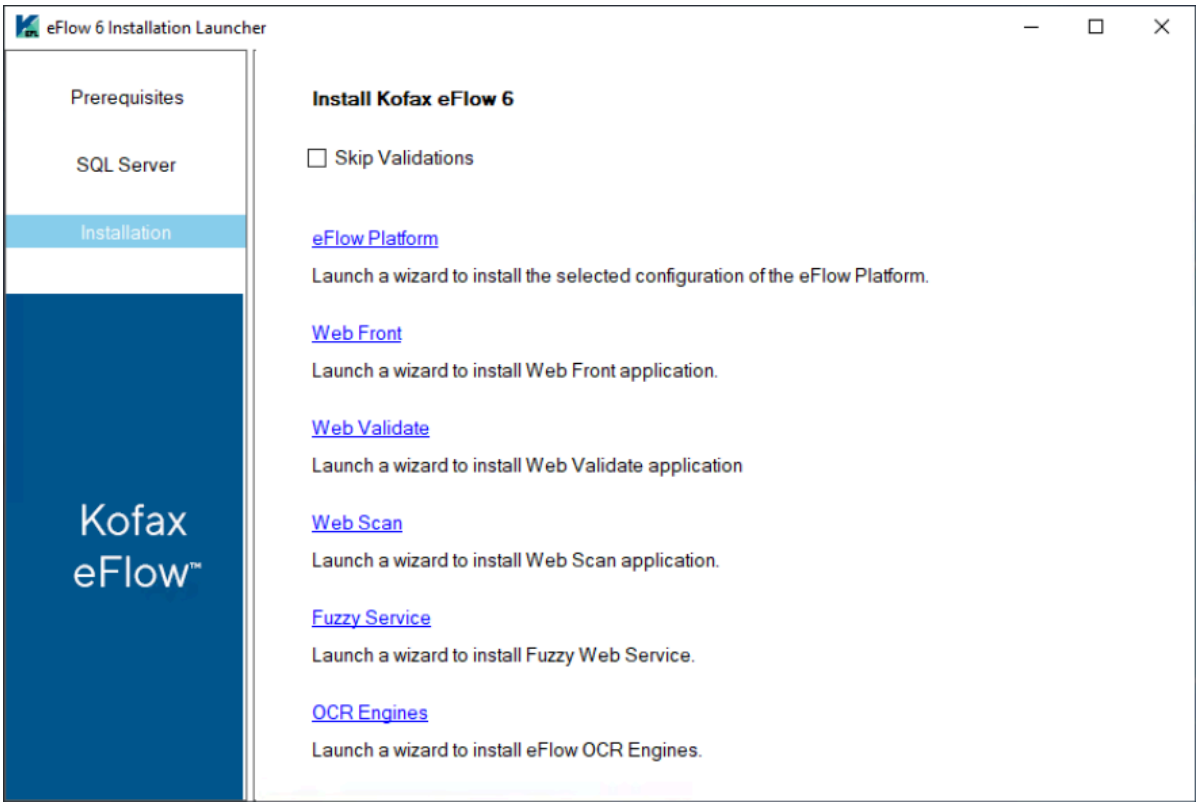


   The eFlow Installation Launcher opens.
3. On the **Prerequisites** tab do the following:
   a. Clear the **Server** check box.
   b. Select the **Client** check box.
   c. Click **Validate**.



If the prerequisites are fulfilled, you can continue with the installation. See Prerequisites validations failure for information on what to do if the prerequisites are not fulfilled.

4. Click the **Installation** tab.
5. Select the **Skip Validations** check box if you do not need to repeat the prerequisites check before starting the installation.
6. Click **eFlow Platform**.

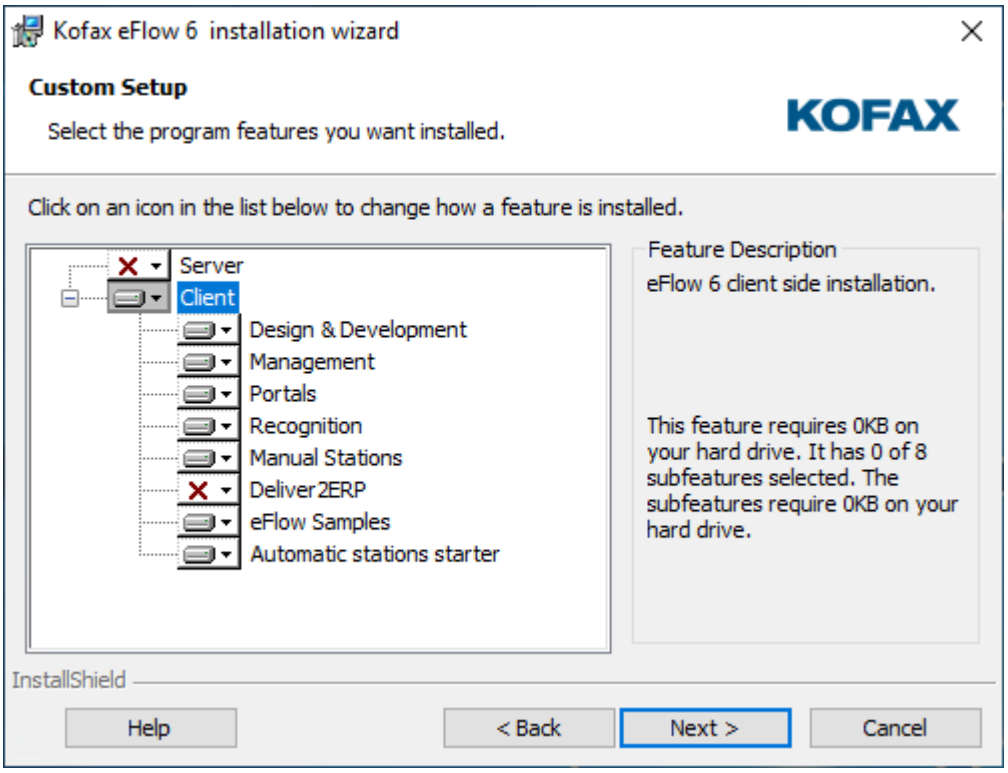


The **eFlow Installation Wizard** opens.

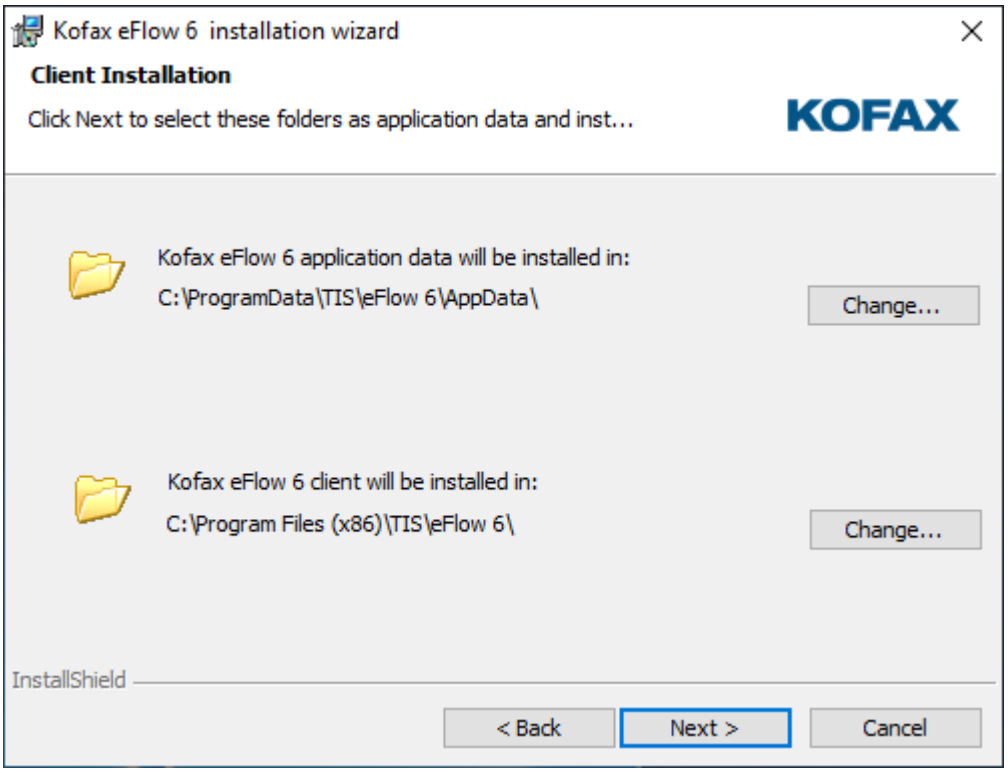
Follow the eFlow Installation Wizard

1. On the Welcome screen, click **Next**.

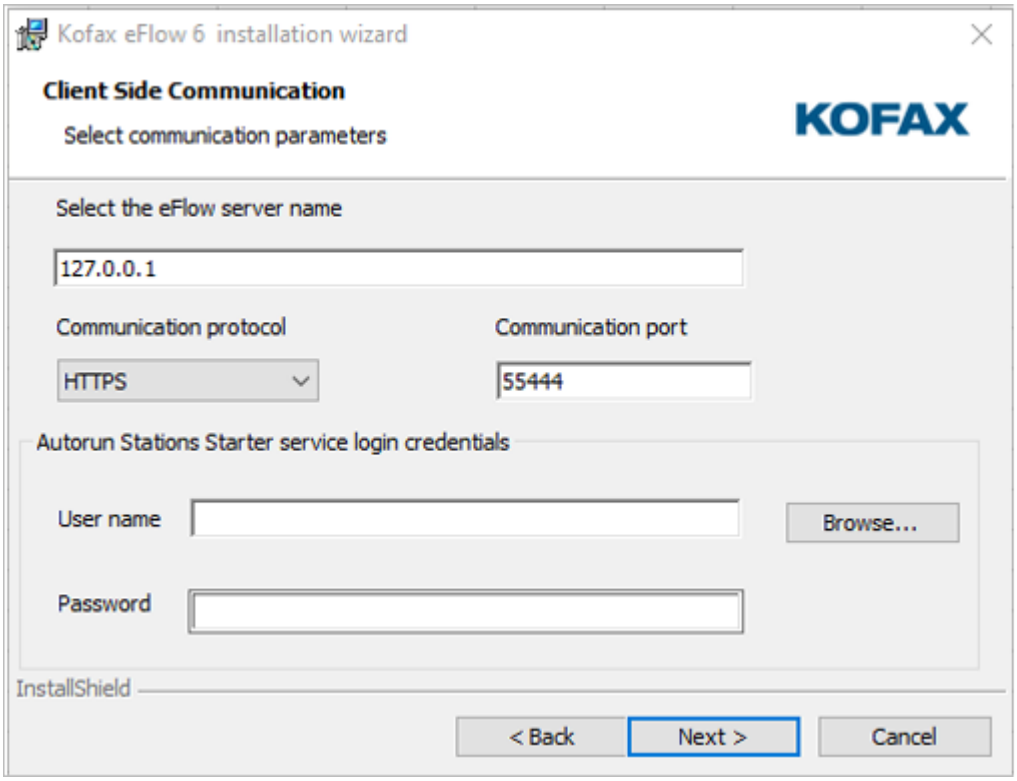
2. Agree to the terms of the license agreement.
3. Select the installation features.



4. Set the installation paths.



5. Set the communication parameters, and then click **Next**.

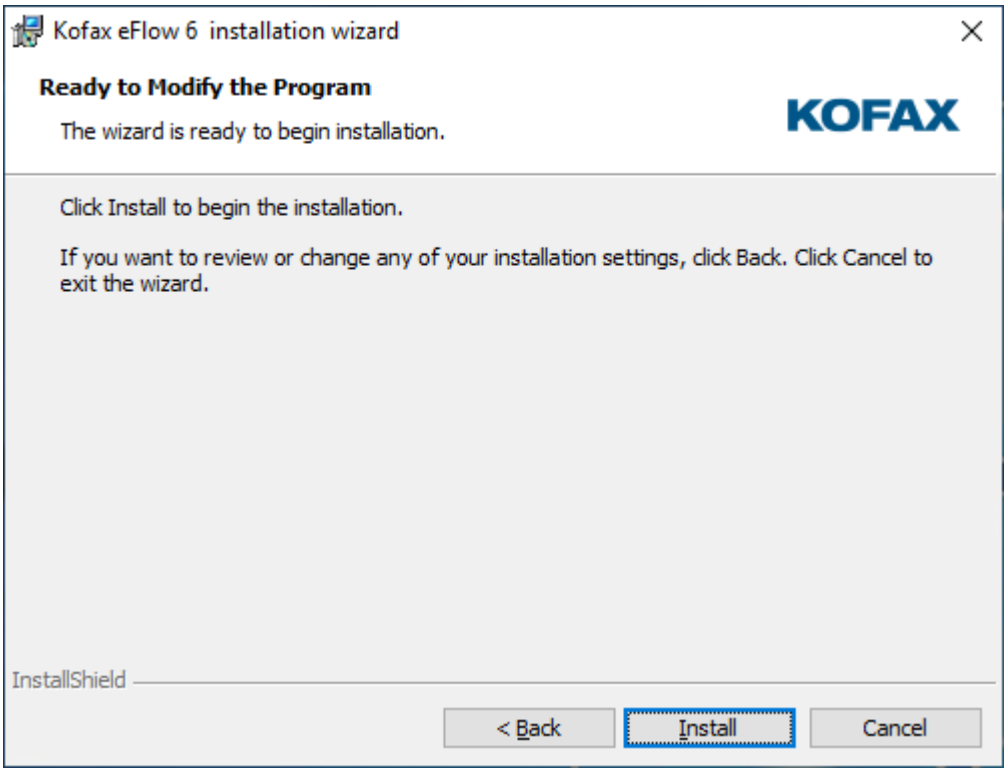


In the **Select the eFlow server name** box, enter the name of the eFlow server to which the client will connect. You can use either the DNS name or the IP address.

The **Communication protocol** type and the **Communication port** number should be the same as those set on the eFlow server.

The **Autorun Stations Starter service login credentials** panel is enabled only if the Autorun Stations Starter service is selected for installation. By default, this service is configured to run under the LocalSystem account. You can use any other account, provided that it has LogonAsService permissions.

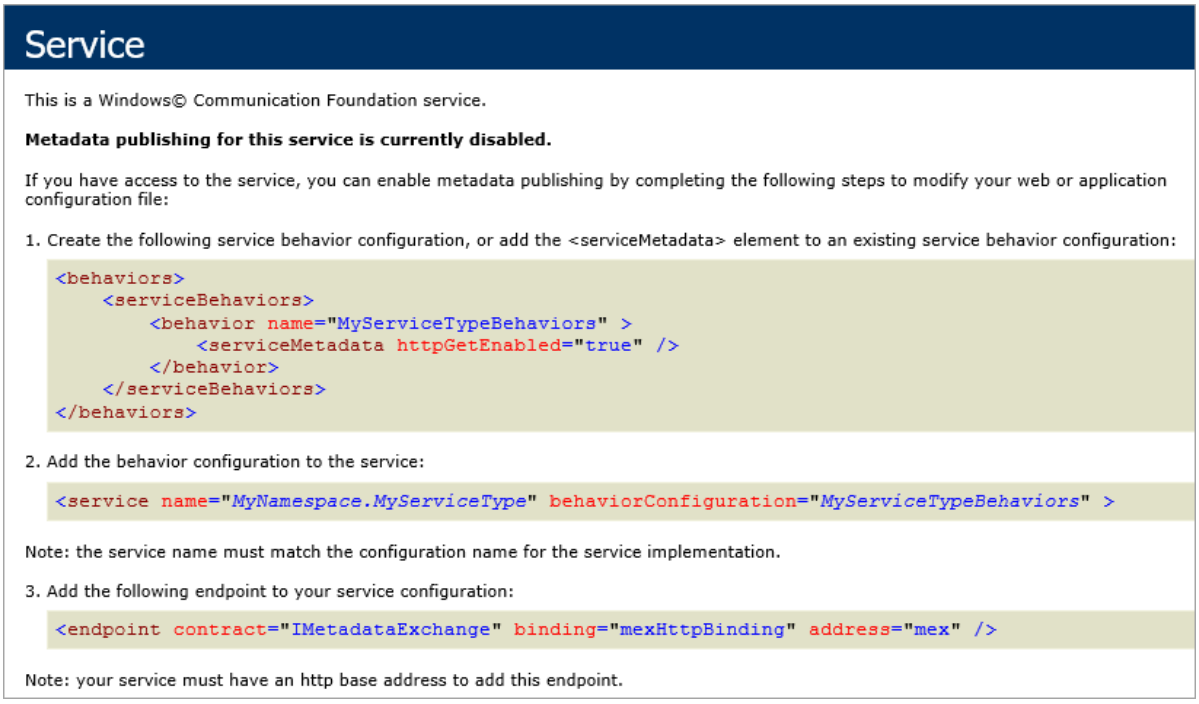
6. Click **Install** to start the installation.


Kofax eFlow 6 installation wizard
Ready to Modify the Program
The wizard is ready to begin installation.
KOFAX
Click Install to begin the installation.
If you want to review or change any of your installation settings, click Back. Click Cancel to exit the wizard.
InstallShield
< Back
Install
Cancel

Check the communication with the eFlow server

Perform the following steps to verify that the communication between the client and the eFlow server is functioning correctly.

1. In the `C:\Program Files (x86)\TIS\eFlow 6\Bin\ConfigSources` folder, open the ClientSection.config file in a text editor.
2. Copy the endpoint address.
   Example: http://<YourServer>:55222/eFlow_6/BasicConfigurationServerService.svc.
3. Open your web browser and paste the endpoint address in the Address bar of the web browser.
   If the following page, or a similar one is displayed, the communication with the eFlow server is functioning correctly.



Prerequisite validations failure

This section explains actions you can perform if the prerequisite validations are not successful.

.NET Framework validation

The full .NET 4.7.2 Framework is required to run eFlow modules. This validation will fail if the full .NET Framework 4.7.2 installation is missing.

- Click **Install .NET Framework** to install the full .NET 4.7.2 Framework from the Launcher.
- Run the .NET 4.7.2 Framework installation directly from the eFlow installation folder.

COMPLUS_ENABLE_64BIT validation

Generally, a 64-bit machine is expected to be working in 64-bit mode. This validation checks whether the COMPLUS_ENABLE_64BIT flag is set or not.

- Click **SetWOW 64-Bit** flag in the Launcher to configure the COMPLUS_ENABLE_64BIT flag.
- From the command prompt, run the following command.

  ```
  C:\WINDOWS\Microsoft.NET\Framework64\v2.0.50727\Ldr64.exe Set64
  ```