

Kofax TotalAgility

Administrator's Guide for Fujitsu MFPs

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Administrator's Guide for Fujitsu MFPs

Preface

This guide describes how to prepare the Fujitsu network scanner to work with Kofax TotalAgility.

Before continuing, see the Kofax website at www.kofax.com for information about 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 Kofax TotalAgility client software for the Fujitsu network scanner provides the following features.

- Management Through Devices in the Kofax TotalAgility Designer (Optional)

MFPs can self-register with Devices and automatically activate licenses, or you can also manually activate, deactivate, or remove MFPs from Kofax TotalAgility. In Devices, you can open the Web page for the MFP if Kofax TotalAgility can communicate over the network with the MFP. See the Devices Help for more information.

The number of MFPs you can use with Kofax TotalAgility depends on your Kofax product license.

Note Automatic discovery of Fujitsu network scanners on the network is not available.

- 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.

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, you can specify the language for the front panel. If the language specified is not supported by Kofax TotalAgility, the default language English is used.

Note Switching the language on the MFP initiates a restart and sets the MFP back to factory conditions. You must reinstall Kofax TotalAgility after switching to another language.

- 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.

- 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.

- Additional Scan Settings

Users can override the default resolution or other scanning options for a document by pressing the Settings button.

Important Scanning different sized pages when the Multifeed Detection option is set to Length or Both generates an error.

- 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 operating systems and other Kofax TotalAgility requirements is the Technical Specifications document, which is available on the Kofax website at www.kofax.com.

Before setting up a network scanner with Kofax TotalAgility, verify that the computer where you will install the client software of the scanner has .NET Framework 2.0 installed.

Preparing for installation on the Network Scanner

Before installing the Kofax TotalAgility client on the network scanner, do the following:

- Install Kofax TotalAgility.
- Download the Fujitsu client software from Devices to your computer.
- Obtain the administrator user name and password for the network scanner.
- If you are upgrading Kofax TotalAgility, uninstall the previous version before installing the new version. See [Uninstalling the Kofax TotalAgility client software](#).

Downloading and installing the fi Network Scanner Admin Tool

1. In a browser window on your computer, enter the IP address for the network scanner (example: <http://111.1.1.1>).
2. When prompted, enter the administrator user name and password for the network scanner and click **Login**.
3. Next to the **fi Network Scanner Admin Tool** click **Next**.
4. In the download window, click **Download**.
5. In the **File Download** window, click **Run**.

The Setup Wizard guides you through the installation, which adds a **fi-scanner** menu item to the Programs menu.

Installing the Kofax client software

1. On your computer, on the Programs menu, select "**fi-scanner**" and then **fi Network Scanner Admin Tool**.
2. In the **Connect to** window, enter the IP address or name of the network scanner. Then, click **Connect**.
3. When prompted, enter the administrator user name and password for the network scanner and click **Login**.
4. On the top menu, select **Maintenance**.
5. On the left-hand menu, select **Add-in Manager**.

6. Locate the correct add-in module file in the folder where you downloaded and extracted the client software.
 - For Fujitsu fi-6000NS: KofaxFujitsuClient.fi6000NS
 - For Fujitsu fi-6010N: KofaxFujitsuClient.fi6010N
 - For Fujitsu N1800 and N7100: KofaxFujitsuClient.N1800
7. Click **Install**.
8. When prompted, click **OK** to install the client software and restart the network scanner.

Note To verify that the file was successfully deployed on your network scanner, open the **fi Network Scanner Admin Tool** and check the system operation log records.

The Kofax button appears on the network scanner main menu.



9. Press the Kofax button.

The **Launch** Kofax TotalAgility options appear.
10. Press **Launch** to start the client software or **Change Server Host** to change host connection information.

Depending on Devices settings, the MFP will self-register and license itself, and connect to the default device profile, if one is defined. See the Devices Help for details on self-registration and device profiles.

Starting the client software

The first time you start Kofax TotalAgility client software on the front panel of the network scanner, you need to specify the server on which Kofax TotalAgility is located. To do so, have the server name or IP address ready.

Kofax TotalAgility has a single sign on feature that can be used with Fujitsu network scanners. Users who log on to the network scanner as a domain user are authenticated when they start the Kofax TotalAgility client software, and their personal destinations automatically appear. To use the single sign on feature, connect the Fujitsu network scanner to a domain controller and use Active Directory Network protocol as described in the documentation for the device. Then, set up domain user accounts.

Note Fujitsu fi-6000NS does not support Active Directory Network protocol. Instead, use LDAP protocol as described in the device's documentation.

1. On the network scanner touch panel, enter the user name and password to log onto the network scanner as a user.
2. If you are planning to use HTTPS to connect to the Kofax TotalAgility server, import the certificate to the device by using the ScanSnap application.

See the Fujitsu documentation for instructions.
3. On the network scanner **Main Menu**, press the Kofax button.

The **Server Host Setting** window appears.

4. In the **Server Host Setting** window, do the following:
 1. Enter the name or IP address for the Kofax TotalAgility server.
 2. 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.
 3. Select the protocol for the connection from the network scanner to Kofax TotalAgility. The default protocol is HTTP.
 4. Enter the port for the connection.

Note If you do not specify a port for HTTP, port 80 is used. For HTTPS, enter port 443.

5. If you are using HTTPS, make sure that **Validate Certificate** is selected so that the client validates its certificate with the one on the specified Kofax TotalAgility server. Clear the setting if you do not want the certificate validated.

This option cannot be selected when the protocol is set to HTTP.

Note If you select **Validate Certificate** after it has been previously cleared, the client software needs to be restarted to validate the certificate.

6. Press **OK**.

The network scanner main menu appears.

Note If **Validate Certificate** is selected, and the client is unable to connect to the server or cannot validate the certificate, an error appears. Click **Retry**. If the validation still fails, click **Cancel**, and the **Server Host Setting** appears where you can change settings. A validation error also appears when you start the client software, and the certificate cannot be validated.

5. Press the Kofax button to display the main menu for the Kofax client software.

Changing the server host settings

Use this procedure to update the server host settings after starting the Kofax TotalAgility client software.

1. On the **Main Menu**, press **Settings**.
2. Press **Server**.

The Server Host Setting window appears.
3. Update the settings and press **OK**.

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.

Uninstalling the Kofax TotalAgility client software

The network scanner is restarted automatically when you remove the software. Uninstall before upgrading to a newer version of Kofax TotalAgility.

1. On your computer, on the Programs menu, select **fi-scanner** and then **fi Network Scanner Admin Tool**.
2. In the **Connect to** window, enter the IP address or name of the network scanner. Then, click **Connect**.
3. When prompted, enter the administrator user name and password for the network scanner. Then, click **Login**.
4. On the top menu, select **Maintenance**.
5. On the left-hand menu, select **Add-in Manager**.
6. Click **Uninstall**.
7. When prompted, click **OK** to uninstall the Kofax TotalAgility client software and restart the network scanner.
8. To upgrade, follow the instructions in [Installing the Kofax client software](#).

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.

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.