

Configure a Mobile Device as a Capture Input Source

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KOFAX

Mobile

- Download the **Kofax Capture** App from Android or Apple App store
- Configure location of **Kofax TotalAgility** server
- Anonymous access configured in IIS
- Can be Anonymous or a logon in KTA
- Upload **Documents** or **Photographs** to a case
- Add case properties
- Image enhancement carried out by Mobile app
- Instructor Demonstration



Create Form to Associate with the Default Device Profile

Forms [Refresh](#)

[New](#) [Generate](#) ▼

Name

- Create new job form
- Scan create new job form
- [Capture](#)
- [Device create new job form](#)

Device create new job form

Process* [Capture Applications \(Process\) ×](#) ▼

Form name*

Category* [Applications ×](#) ▼

[Cancel](#) [Generate and save](#) [Generate and release](#)

Managing Devices

- From the **Main** menu navigate to **System > System settings** and click **Devices** in the **Capture** card
- The Devices link can be used to discover devices on the same network so you can add devices to Kofax TotalAgility
- Devices that are on different subnets or outside a firewall can connect with Kofax TotalAgility, and be added and self-registered

Devices & Device Profiles

Devices

Device Profiles

Settings

Refresh

Create

Edit

Delete

Deploy

Download

Devices

<input type="checkbox"/>	Device Name	Host Name	Vendor	Model	IP Address	MAC Address	Device Profile	Last Access
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	6e:69:10:e5:02:92	6e:69:10:e5:02:92	vendor	iPhone9,3	192.168.1.146	6e:69:10:e5:02:92	Default Profile	2019-03-11 10:03:20
<input type="checkbox"/>	WIN-OD9AMN1128I	WIN-OD9AMN1128I	MFP Emulator	MFP Emulator	192.168.1.72	08-00-27-06-61-62	Default Profile	2019-03-15 13:09:06

Devices

Device Profiles

Settings

Refresh

Create

Edit

Delete

☐ Name

☐ [Default Profile](#)

Device Profiles – General & Associated Devices Tabs

The 'General' tab is selected and highlighted with a blue border. It contains the following fields:

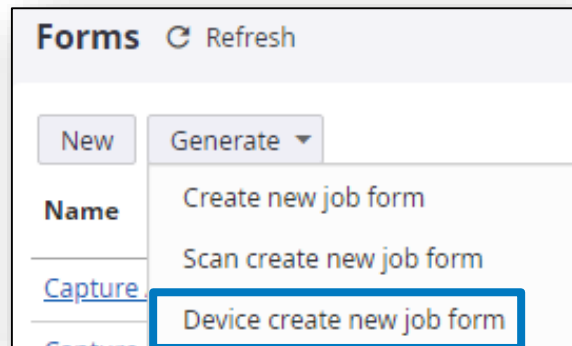
- Name:** A text input field containing 'Default Profile'.
- Description:** A text input field containing 'Default Profile'.
- Logon:** A dropdown menu with 'Allow Login' selected.
- Default:** A checkbox that is checked.
- Auto Logout Time (Fujitsu only):** A text input field containing '300'.

The 'Associated Devices' tab is selected and highlighted with a blue border. It displays two columns: 'Available:' and 'Associated:'. The 'Associated:' column contains a highlighted entry with the MAC address '6e:69:10:e5:02:92' and the device name 'WIN-OD9AMN1128I'. Navigation arrows are present between the two columns.

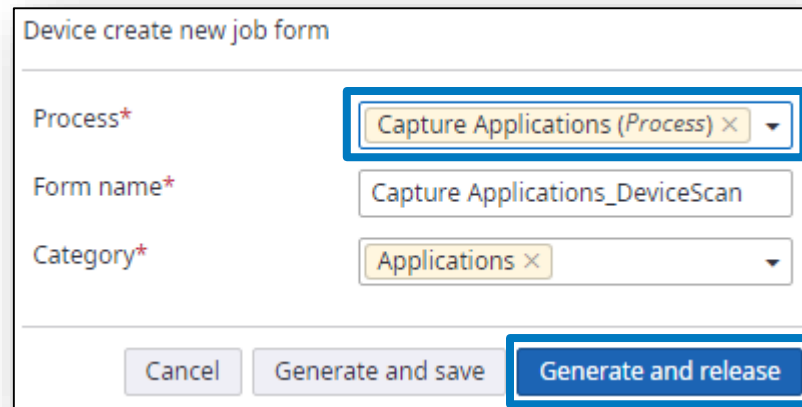
Available:		Associated:
	>	6e:69:10:e5:02:92 WIN-OD9AMN1128I
	<	

Create Form to Associate with the Default Device Profile

- From the **Main** menu navigate to **User interface > Forms** and click **Generate > Device create new job form**



The screenshot shows the 'Forms' menu with a 'Refresh' button. The 'Generate' dropdown is open, showing three options: 'Create new job form', 'Scan create new job form', and 'Device create new job form'. The 'Device create new job form' option is highlighted with a blue box.



The screenshot shows the 'Device create new job form' dialog. It has three fields: 'Process*' with a dropdown menu showing 'Capture Applications (Process) ×', 'Form name*' with a text input field containing 'Capture Applications_DeviceScan', and 'Category*' with a dropdown menu showing 'Applications ×'. At the bottom, there are three buttons: 'Cancel', 'Generate and save', and 'Generate and release'. The 'Generate and release' button is highlighted with a blue box.

Select Available Form & General Settings

This screenshot shows the 'Associated Forms' tab within the 'Device Profiles' settings. The left sidebar contains 'Devices', 'Device Profiles' (highlighted), and 'Settings'. The top bar has 'Save' and 'Cancel' buttons. The main area has tabs for 'General', 'Associated Devices', 'Associated Forms' (selected), and 'Custom Metadata Fields'. Below the tabs, there are two lists: 'Available:' on the left and 'Associated:' on the right. The 'Associated:' list contains one item, 'ScanApplications', which is highlighted. Navigation arrows (> and <) are positioned between the two lists.

Devices

Device Profiles

Settings

Save Cancel

General Associated Devices Associated Forms Custom Metadata Fields

Available:

Associated:

ScanApplications

This screenshot shows the 'Settings' dialog box, specifically the 'General' tab. The left sidebar has 'Settings' (highlighted). The top bar has 'General' and 'Advanced' tabs. The main area contains four settings: 'Enable MFP Self-Registration' (checked), 'Require Authentication for Device Registration' (unchecked and highlighted), 'Disable MFP Single-Sign-On without password' (unchecked), and 'Display Confirmation Messages' (unchecked).

Settings

General Advanced

☒ Enable MFP Self-Registration

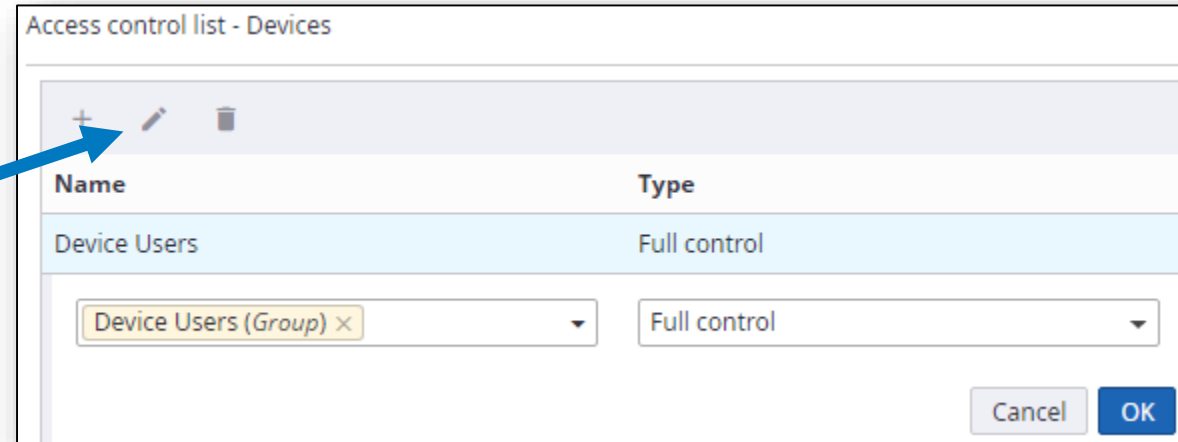
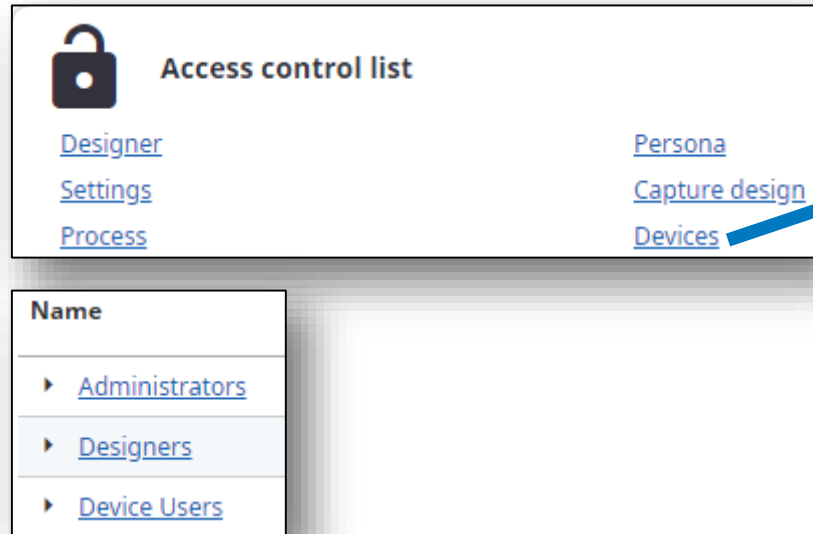
☐ Require Authentication for Device Registration

☐ Disable MFP Single-Sign-On without password

☐ Display Confirmation Messages

Device Permissions

- In order to use submit a job (using a device) to TotalAgility you will need to have the appropriate permissions
- The installation account by default has access to MFP devices and is automatically made a member of the Device Users group
- You can grant access to a built-in group called Device Users or you can explicitly assign permissions in **System > System settings > Devices** in the **Access control list** card



Mobile Devices

- First, download and install the “Kofax Mobile Capture” application from either the Apple App Store or Google Play
- Wi-Fi must be enabled on your device for Kofax Mobile Capture to connect to your demo machine and register the mobile device
- Your mobile device and your demo machine must be on the same network



Make sure your device meets the requirements defined on the compatibility matrix on the Kofax Web site (this file can be viewed/downloaded with Anonymous access):
http://www.kofax.com/support/notices/Kofax_Cross_Product_Compatibility_Matrix.xls

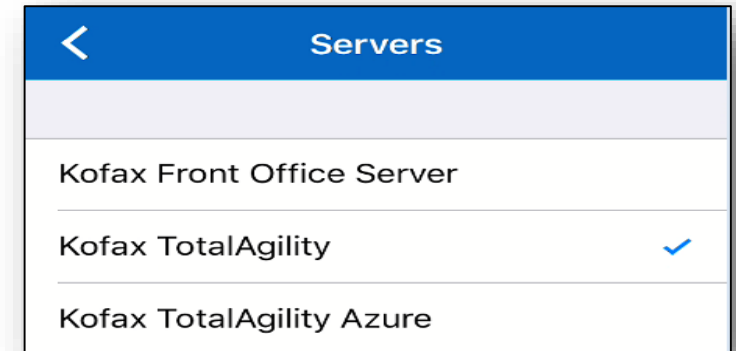
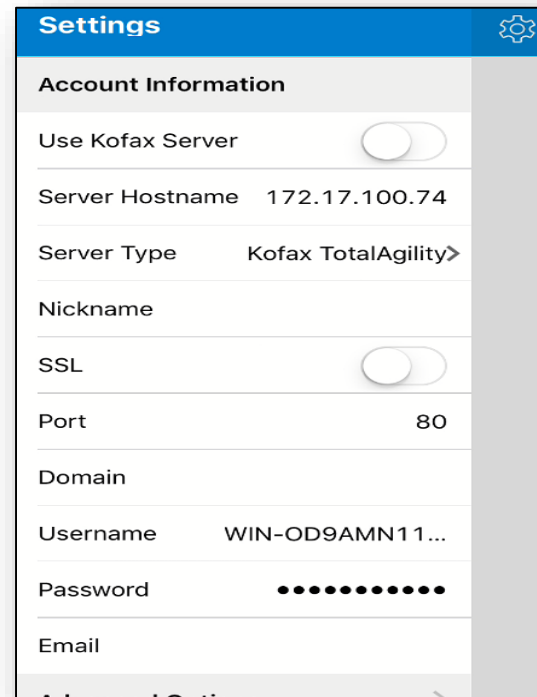
Mobile Devices – Connect to Wi-Fi and Network

- Here is an example of how you would connect your iPhone to Wi-Fi and then to your network that has your demo machine:



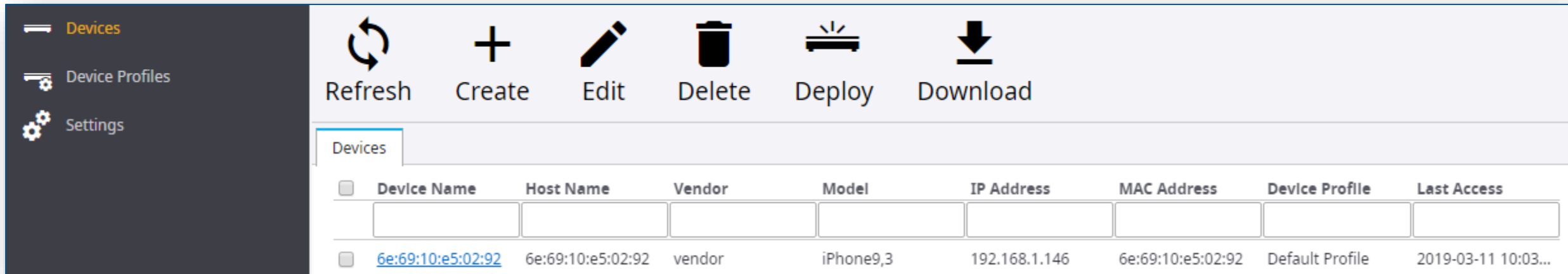
Mobile Devices – Configure Kofax TotalAgility Server

- Then launch the Kofax Mobile Capture application from your mobile device
- Tap “Settings” in order to configure the Kofax TotalAgility Server with its IP address and login information:



Mobile Devices – Confirm Mobile Device Detected

- After you login to the Kofax TotalAgility Server from your mobile device, the Devices module should automatically detect the new device:



The screenshot displays the Kofax TotalAgility Server interface. On the left is a dark sidebar with three menu items: 'Devices' (highlighted in orange), 'Device Profiles', and 'Settings'. The main content area has a light blue header with six action buttons: 'Refresh' (circular arrow), 'Create' (plus sign), 'Edit' (pencil), 'Delete' (trash can), 'Deploy' (server rack), and 'Download' (downward arrow). Below the header is a table titled 'Devices'. The table has eight columns: 'Device Name', 'Host Name', 'Vendor', 'Model', 'IP Address', 'MAC Address', 'Device Profile', and 'Last Access'. The first row is empty. The second row contains the following data: a checkbox, the MAC address [6e:69:10:e5:02:92](#), the Host Name '6e:69:10:e5:02:92', the Vendor 'vendor', the Model 'iPhone9,3', the IP Address '192.168.1.146', the MAC Address '6e:69:10:e5:02:92', the Device Profile 'Default Profile', and the Last Access '2019-03-11 10:03...'.

	Device Name	Host Name	Vendor	Model	IP Address	MAC Address	Device Profile	Last Access
<input type="checkbox"/>								
<input type="checkbox"/>	6e:69:10:e5:02:92	6e:69:10:e5:02:92	vendor	iPhone9,3	192.168.1.146	6e:69:10:e5:02:92	Default Profile	2019-03-11 10:03...

Mobile Devices – Submitting a Case in Kofax Mobile Capture

- Whether you are using an iPhone or an Android, you are going to bring up the Kofax Mobile Capture app's home page
- You should see the Device create new job form that you created in Kofax TotalAgility's Form Designer (refresh or re-login to the app if needed)
- Tap the form name and the Capture screen appears
- Place a sample document or business card on a flat surface and tap the photo icon on your mobile device
- After your photo is saved, you have the option to tap the Edit option to Crop or Rotate the image until you are pleased with it
- If you are happy with the image, you can tap the Use option, and tap Done
- Finally, select the "Submit to Kofax" option and the image will be uploaded

Mobile Devices - Kofax TotalAgility Workspace

The image displays the Kofax TotalAgility Workspace interface. At the top, a navigation bar includes 'To Do', 'Scan Applications', 'Jobs', 'Resources', 'Administration', and 'Test Val'. Below this, a 'Jobs' section shows a list of processes. A blue arrow points from a text box 'Running job – click to view details' to the 'Capture Applications' job entry in the list. The job entry shows a red status indicator, a timestamp of 8/15/2018 4:14:26 PM, and a creator 'Paul Black'. The job is listed with a priority of 1 and a status of 'Active'. The version is 13, and there is a 'Select' action link. Below the job list, a 'View Job' text box has a blue arrow pointing to the 'View Job' option in the left sidebar. The main content area shows the 'Capture Applications' job details for Version 13. The workflow diagram consists of four steps: 'Classification', 'Document Review', 'Extraction', and 'Validation'. The 'Validation' step is highlighted with a blue border. A 'Color Legend' panel on the right lists various job statuses with corresponding color swatches: Completed (black), Taken (blue), Awaiting Allocation (red), Awaiting Events (yellow), On Hold (pink), Pending Completion (green), Saved (dark green), and Suspended (grey).

Process	SLA (Job)	Expected Duration	Creator	Priority	Status	Version	Action
<input type="checkbox"/> Capture Applications		8/15/2018 4:14:26 PM	Paul Black	1	Active	13	Select
<input type="checkbox"/> Capture Applications		8/15/2018 4:16:38 PM	Paul Black	1	Active	13	Select
<input type="checkbox"/> Capture Applications					Active	13	Select

View Job

Color Legend

- Completed
- Taken
- Awaiting Allocation
- Awaiting Events
- On Hold
- Pending Completion
- Saved
- Suspended