



# Guide to the Kofax Support Portal

Kofax Technical Support

**December 2011**

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## 1 Introduction

Our Web-based support is provided via the Kofax Customer Portal (“the portal”) and will provide you the following advantages.

- Automated recording of support requests (Cases)
- Stores Case history for later review
- Provides a mechanism to submit and review Cases 24 hours a day
- Notifies customers when their Case has been modified

Response times for Cases submitted via the Kofax Customer Portal during normal Business Hours are the same as for Cases submitted via telephone.

This document is intended to guide our customers through the process of Case creation and interaction with Kofax Support representatives through the portal.

## 2 Accessing the portal

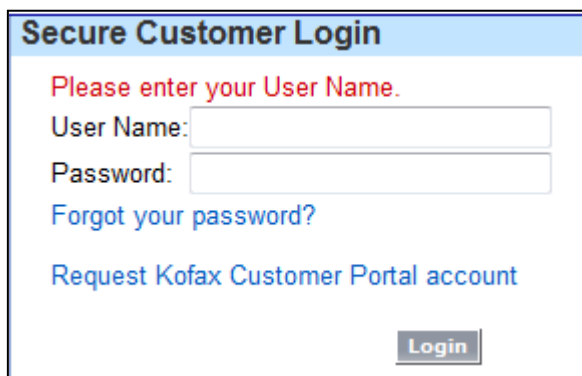
### 2.1 Requesting an account

You can request your Kofax Customer Portal account by filling the form available at [Kofax Customer Portal Account Request form](#). For security purposes, we request that you only specify corporate email addresses when completing the form. Additionally, you should refrain from using “shared corporate addresses (i.e. [support@company.com](#)).

Once you have completed this form, you will receive your user credentials in a separate email (usually within 1 business day). If you do not receive your credentials, verify that it was not intercepted by your spam filter.<sup>1</sup>

### 2.2 Logging in

Once you have your login and password, click [Kofax Customer Portal](#), fill in your credentials and press the login button.



### 2.3 Retrieving your password

In the Case that you forgot your password, click on the *Request Kofax Customer Portal Account* accessible from the [Kofax Customer Portal page](#). Once you have filled in the form, you will receive your new password.

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<sup>1</sup> In case you need to retrieve the mail in your spam folder, the subject of this mail will be “Your new Kofax Customer Portal password”.

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## 2.4 About the portal

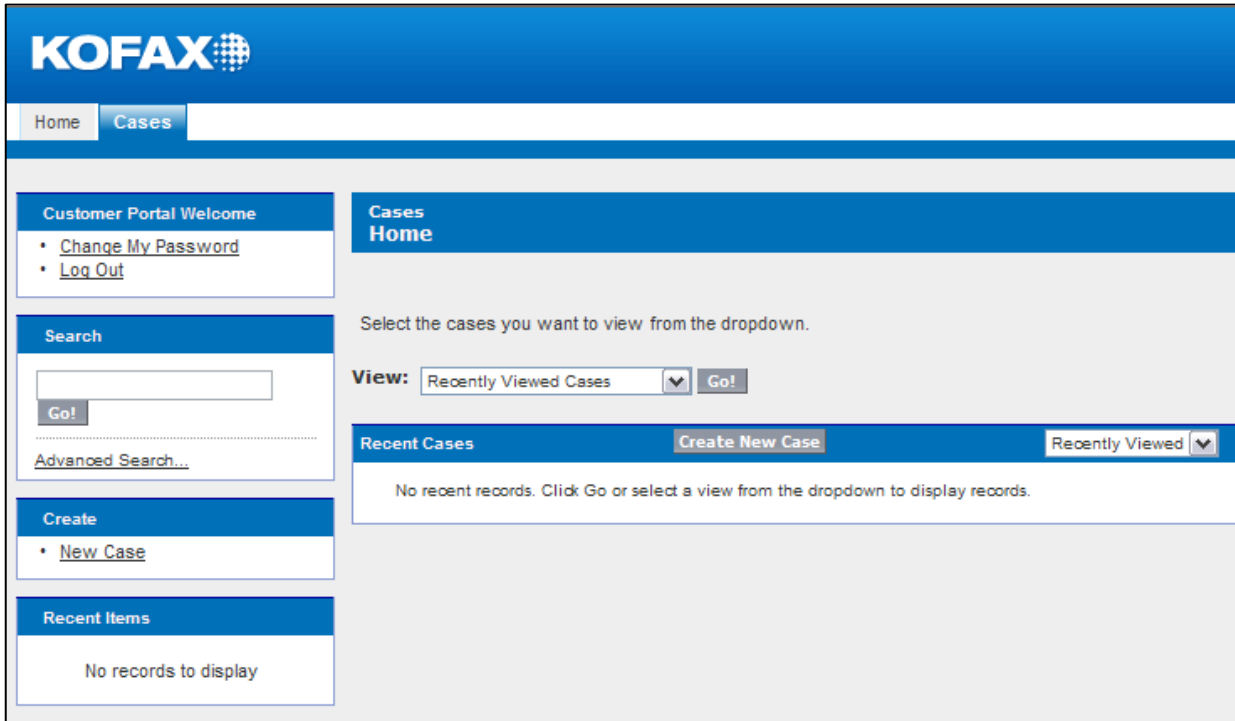
The portal is composed of two tabs accessible by clicking on each respective tab (“Home,” and “Cases” just under the Kofax Logo).

The home page is the default page for the portal and is accessible via the “Home” tab. It contains a set of useful links that could help you in responding to the support request you may have. The left side of this page gives you the options to change your password, search for a keyword in your existing Cases and report a new Case.



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The “Cases” tab provides the ability to list and respond to your reported Cases.



By Default *Recently Viewed Cases* can be seen by clicking the “Go” Button but you may want to select the “Portal- All My Cases” view.

From the home page, click on the appropriate Knowledge Base and use the search features found there.

## 3 Before Contacting Support

Prior to opening a Case with Kofax Technical Support, we suggest that you take the following steps:

### 3.1 Access Kofax Knowledge Bases

Kofax Research and Development (R&D) Engineers, Technical Support Engineers, Professional Services Consultants and Technical Publication Writers are continuously working to create and improve the body of knowledge available on the Kofax Supports Sites. Prior to logging a Case we ask that you search the Knowledge Base applicable to your product for a possible answer to your question, or solution to your problem. Perform a search in the Articles section on any error message, key words and/or Kofax components related to the issue.

### 3.2 Documentation Review

Review the Product documentation for the version of Kofax products you are running.

- Current documentation can be accessed at [Documentation](#)
- Previous MarkView documentation can be found in Knowledge Articles in the Customer Portal

### 3.3 Diagnostic Articles, Best Practices and Support Tools

Review and follow the steps outlined in the Diagnostic and Best Practices Article(s) for the specific affected Kofax component(s).

### 3.4 Service Packs

Review the Service Pack list for your specific version of Kofax Components to ensure that you have all of the latest Service Packs applied. Use the Download search page: [Downloads](#)

## 3.5 Supported Versions

Review the Cross Product Platform Matrix to insure that you are running a supported version of Kofax Components.  
[Kofax Cross Product Compatibility Matrix](#)

## 4 Important Information To Gather Before Opening A Case

If you have followed all of the relevant steps outlined above, and you still need assistance from Kofax Support, please be prepared to provide the following information when logging the Case. Providing as much information as possible when opening a Case will help Kofax Support Engineers to route and resolve your Case quicker.

### 4.1 Serial Number

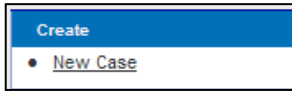
See “How to retrieve Kofax Capture Serial Number” in the Appendix

### 4.2 Additional Information

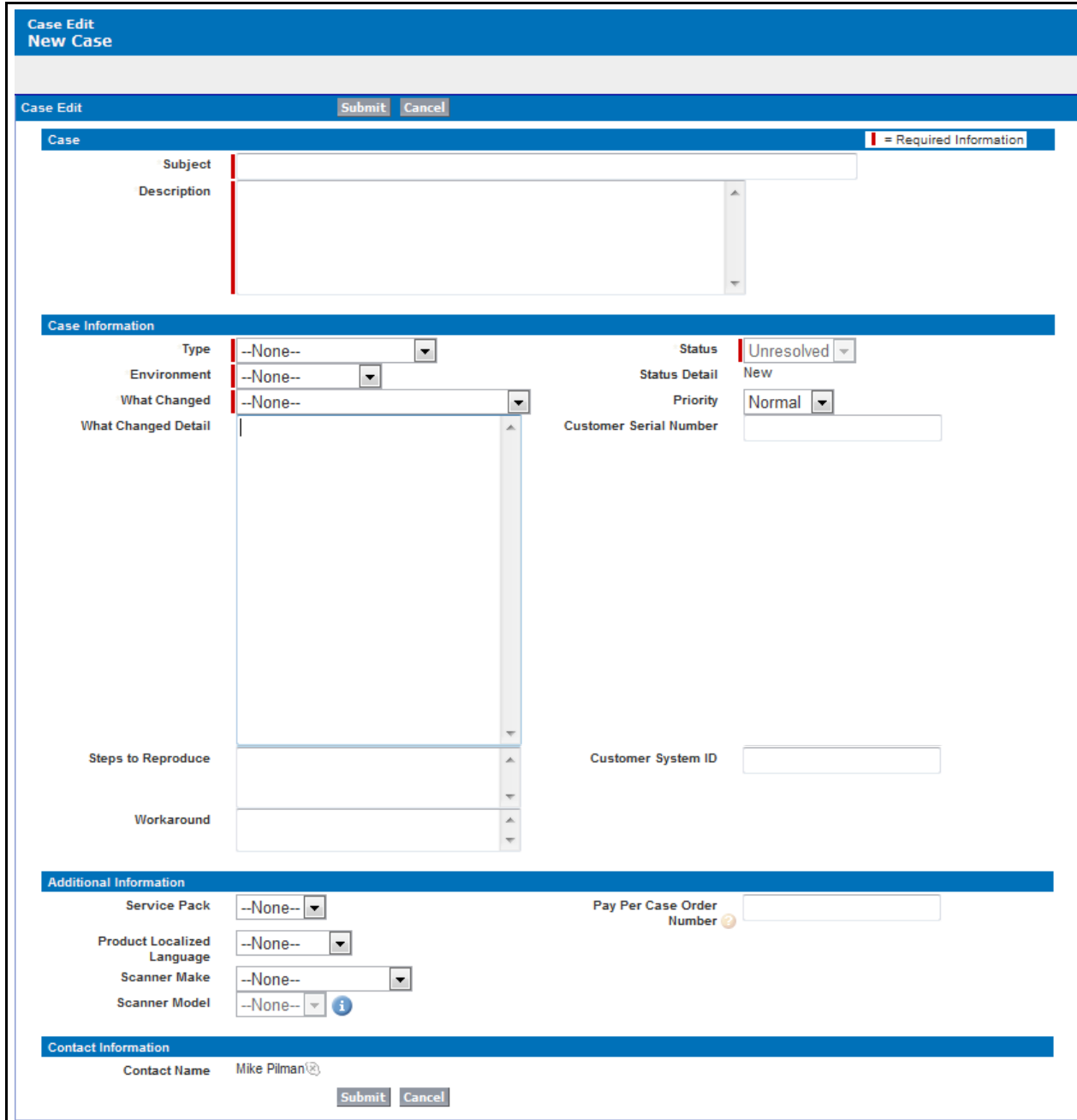
Guides on Information to gather have been split out by product in the Appendix.

## 5 Creating a New Case

Click on the Create "New Case" link.



Start filling the fields in relation to your system configuration. Fields highlighted in red are required to submit your Case.



The screenshot shows the 'Case Edit' form for creating a new case. The form is divided into several sections:

- Case Edit Header:** Includes 'Submit' and 'Cancel' buttons.
- Case Section:** Contains 'Subject' and 'Description' text boxes. A red vertical bar is on the left side of the 'Subject' and 'Description' labels, indicating they are required fields. A legend indicates that a red bar means '= Required Information'.
- Case Information Section:** Contains several dropdown menus and text boxes:
  - 'Type' dropdown: --None--
  - 'Environment' dropdown: --None--
  - 'What Changed' dropdown: --None--
  - 'What Changed Detail' text box
  - 'Status' dropdown: Unresolved
  - 'Status Detail' dropdown: New
  - 'Priority' dropdown: Normal
  - 'Customer Serial Number' text box
  - 'Customer System ID' text box
  - 'Steps to Reproduce' text box
  - 'Workaround' text box
- Additional Information Section:** Contains several dropdown menus and a text box:
  - 'Service Pack' dropdown: --None--
  - 'Product Localized Language' dropdown: --None--
  - 'Scanner Make' dropdown: --None--
  - 'Scanner Model' dropdown: --None-- with an information icon
  - 'Pay Per Case Order Number' text box with a help icon
- Contact Information Section:** Contains a 'Contact Name' text box with the value 'Mike Pilman' and 'Submit' and 'Cancel' buttons.

## 5.1 Subject and Description

Enter a Subject Line that contains any error codes and briefly describes the particulars of the question or problem you have. Enter a thorough description of the question or issue.

## 5.2 Key Information

Fill in the type (category) of question or issue you have, the environment it is related to or occurring in, and any recent changes that may have affected the system.

## 5.3 Filling in your license information

The serial number / system id is a must have for certain products such as Kofax Capture and Kofax Transformation Module. If not entered, you will be asked to provide this information by the support representative before they can be working on your Case. Refer to the appendix for a help on how to find your serial number.

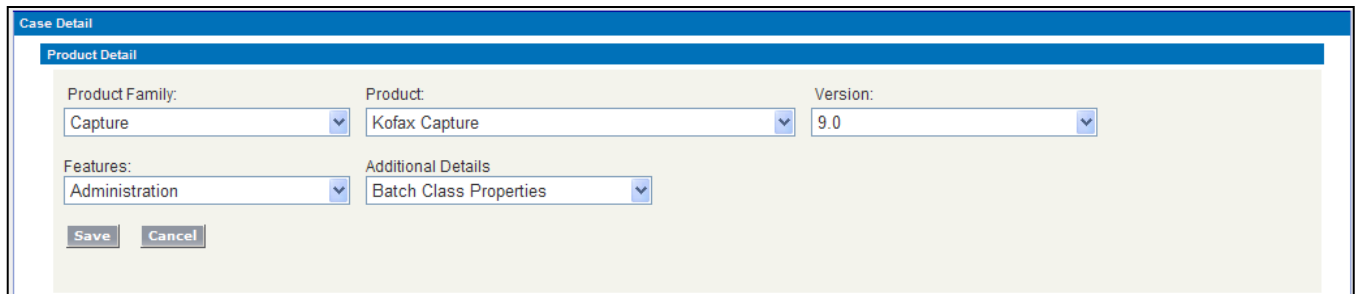
## 5.4 Additional information

We have provided you an opportunity to fill in answers for some questions we frequently ask when a new Case is opened. The more detail you provide the quicker we will be able to get to the root of the issue you are having.

## 5.5 Product Detail

When you have entered the details, click on "Submit".

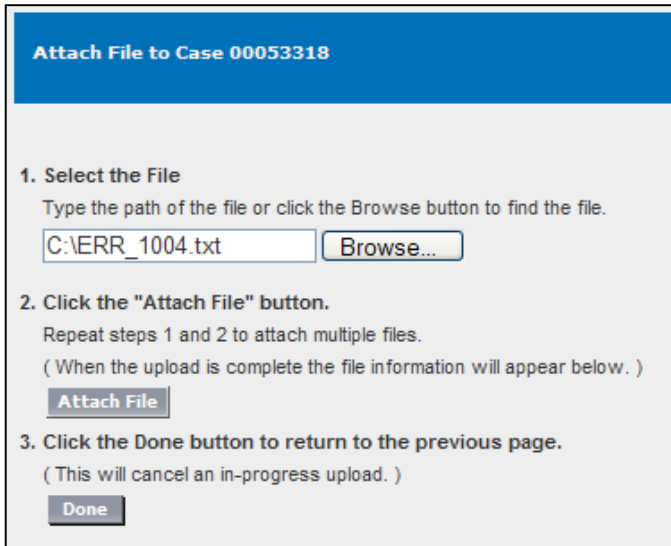
Next enter the product family, product name, version, feature and additional details, IMPORTANT – Be Sure to click on "save."



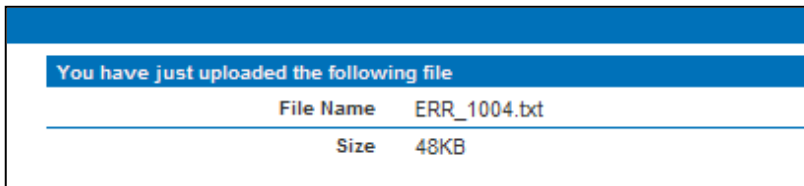
The screenshot shows a web form titled "Case Detail" with a sub-section "Product Detail". The form contains several dropdown menus and two buttons. The "Product Family" dropdown is set to "Capture". The "Product" dropdown is set to "Kofax Capture". The "Version" dropdown is set to "9.0". The "Features:" dropdown is set to "Administration". The "Additional Details" dropdown is set to "Batch Class Properties". At the bottom left of the form are two buttons: "Save" and "Cancel".

## 5.6 Adding Attachments

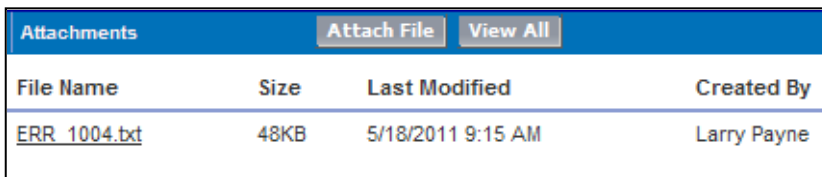
Once you have specified the Product Detail, you should add attachment(s) (like screen shots and log files) that will assist in describing the issue you are reporting.



Click on *Attach file* and wait for the file to be uploaded.



Once Uploaded, don't forget to click on the **Done** button otherwise the file will not be attached to the Case.



## 5.7 Attaching a file larger than 2MB

The file size limit is 2Mb. If your file is bigger, please send it to the anonymous ftp site <ftp://ftp.kofax.com/pub/support/incoming><sup>2</sup>. Name your compressed file with the support Case Number and add a Case Comment within the Portal to explain that you have uploaded the file to the ftp.

<sup>2</sup> The incoming ftp site is configured so that after sending the file, the file will only be visible by Kofax Technical Support. This explains why you will not see it after the upload. It does not require any credentials to upload files.

## 5.8 Adding a Comment

When you need to update your Case, add a Comment. Click on *Add Comment* and enter your Comment.

**Case Comment Edit** Save Cancel

**Case Details** | = Required Information

Subject Demo new case

**Comment Details**

Comment

The scan module on a productive station gives the error 7001 when scanning. This happens randomly and not frequently. The Kofax Capture server is installed on a Windows 2008 STD 32bits SP1 in English and the scan stations on Windows XP SP3 32 bits in Spanish. We are using the standard database instance coming with Kofax Capture. In reference to the problem, I have been looking at the article 1342 of your knowledgebase but it does not help. I enclose to this request the Batch Class, sample images and the error log file.

Save Cancel

## 6 Interacting with Technical Support

After a Kofax Technical Support representative updates your Case an automated email will be sent to you, informing you that the Case has been updated,. Make sure that no email gets intercepted by your spam filter.

You should use the link provided in the email to log in and review or update your Case.

## 7 Viewing Open Cases

Use the Cases Tab at the top of any portal screen or use the Search dialog to list and search for Cases you have access to.

Home Cases Articles

Customer Portal Welcome

- Change My Password
- Log Out

Search

Go!

Advanced Search...

Create

- New Case

Recent Items

**Cases Home**

Select the cases you want to view from the dropdown.

View: Portal- Account Cases Go!

**Recent Cases** Recently Viewed

Case Number	Subject	Contact Name	Status	Priority	Date/Time Opened	Last Modified Date/Time
00067245	test12345	Pilman, Mike	New	Normal	4/28/2011 9:11 AM	4/28/2011 9:12 AM
00067254	This is a test	Pilman, Mike	New	Critical	4/29/2011 6:31 AM	4/29/2011 6:31 AM
00067256	subject	Pilman, Mike	New	Critical	4/29/2011 7:09 AM	4/29/2011 7:09 AM

Refer to the appendix for an explanation of Case Statuses.

## 8 Appendix

### 8.1 Statuses

Status	Status Detail	Action Responsibility / Description
New	New	Kofax – A new case is created in the Portal and is waiting for an initial response from Kofax.
Unresolved	Customer Updated	Kofax – Customer has updated the case and is waiting for Kofax to respond.
	Unresolved	Kofax – Kofax has acknowledged a new case or a case update and is indicating that they are researching the issue and will respond.
Waiting	On-Hold Waiting Installation	Customer – Used when the customer is responsible for contacting support after the software/hardware installation is completed.
	On-Hold Customer	Customer - Used if the customer requests that the case remain open until a specified date.
	Waiting for Customer Feedback	Customer – Used when a customer has been provided with a solution or has been asked for additional information required to progress the case.
	Resolution Pending Customer Confirmation	Customer – Used if a resolution was provided to the customer but Kofax is awaiting confirmation from the customer that the resolution worked.
Closed	No Feedback	Customer - Customer does not respond to a Case that has been 'Waiting for Customer Feedback'.
	Development (R&D or PS)	None – This case has been referred to Kofax Professional Services for work or R&D for possible resolution in a future release of the software.
	Not Entitled	None - Customer is not entitled to support because of expired Contracts/Maintenance or lack of certified training.
	Resolved	None - Customer confirmed via the support case or phone that the issue is resolved. None – Duplicate - If the same issue is in another case for the same contact. Customer - Customer cannot reproduce the error.

## 8.2 Checklists

In order to ensure a fast and efficient resolution of your support request, please make sure to provide as much information as possible when submitting your Case. The checklist below will help you in identifying what most information should be provided.

### 8.2.1 Kofax Capture / KCNS

Information type	Information to Gather
Product Information	License Serial Number and backup serial number (if applicable)
	Specify Kofax Capture version numbers and SP's
	Name of Document Management System, Server and client version
	Kofax add-on's and version: (KTM, AXP, Xtrata, etc.)
Impact	Is this a production or a test environment?
	What is the impact of this issue on your production?
Environment Information	Server OS Version and Service Pack Level
	Workstation OS Version and Service Pack Level
	Are batches in SQL Server?
	Database Type & version
	Back-end Name and Version
Network Description and Details	
Reproduction Scenario	Describe in detail the steps to reproduce the problem
Troubleshooting	Can the problem be isolated to <ul style="list-style-type: none"> <li>• a batch class</li> <li>• a document class</li> <li>• a form type</li> <li>• a specific set of data (images)</li> </ul>
Research	<a href="http://knowledgebase.kofax.com/faqsearch/search.aspx">http://knowledgebase.kofax.com/faqsearch/search.aspx</a> <a href="http://support.microsoft.com/">http://support.microsoft.com/</a> <a href="http://forums.kofax.com/">http://forums.kofax.com/</a>
Data to Collect	Error Logs <sup>3</sup> <ul style="list-style-type: none"> <li>• ERR_YMMM.txt, LOG_YMMM.txt, LIC_YMMM.txt</li> <li>• ACIC_YMMM.txt, ACIS_YMMM.txt, KDB logs</li> <li>• Batch classes</li> <li>• Sample images showing problems</li> </ul>

<sup>3</sup> The knowledgebase article <http://knowledgebase.kofax.com/faqsearch/results.aspx?QAID=10643> describes where the Kofax Capture log files are.

## 8.2.2 MarkView

Information Type	Information to Gather
Product Information	MarkView Version (via Version Information from MarkView Support Tools)
Impact	Is this a production or a test environment?
	What is the impact of this issue on your production?
	Is affecting all users/some users? Is occurring at all time or is it sporadic?
Environment Information	ERP Version / Database Version / Application Server Version / OS Version List any environmental changes that occurred (ERP patch, DB upgrade, OS patch, MarkView patch, network change, desktop change, additional user rollout, etc)
Reproduction Scenario	Describe in detail the steps to reproduce the problem Can the issue be reproduced in a non-production environment? Detail any workaround available
Research	Link to the articles or web page that you have already been looking at
Troubleshooting	Provide any and all troubleshooting steps taken thus far.
Data to Collect	Provide all data/log files/screenshots/work item histories/etc as specified in the appropriate MarkView Component Troubleshooting KB article(s)

## 8.2.3 Kofax Transformation Modules

Information type	Information to Gather
Product Information	Specify KC <i>and</i> KTM version numbers including build numbers*
Impact	Is this a production or a test environment?
	What is the impact o this issue on your production?
Environment Information	Database Type and Version (if accessed from scripting)
Reproduction Scenario	Describe in detail the steps to reproduce the problem*
Troubleshooting	Can problem be isolated to a single image? *
	Have you debugged scripts to isolate a line of code causing an issue?
Research	Link to the articles or web page that you have already been looking at <a href="http://knowledgebase.kofax.com/faqsearch/search.aspx">http://knowledgebase.kofax.com/faqsearch/search.aspx</a> <a href="http://support.microsoft.com/">http://support.microsoft.com/</a> <a href="http://forums.kofax.com/">http://forums.kofax.com/</a>
Data to Collect	A clear and detailed description of the solution the customer is trying to achieve with the project.
	All project files
	Custom modules needed to run the project, along with instructions to install and run them
	Sample images showing problems
	All error logs <sup>4</sup> <ul style="list-style-type: none"> <li>• ERR_YMMM.txt, LOG_YMMM.txt, LIC_YMMM.txt (.\Capture\Logos or .\AscentSV\Logos)</li> <li>• ACIC_YMMM.txt, ACIS_YMMM.txt, KDB logs</li> <li>• XtrataPro_YYYYMMDD.txt (.\CaptureSS\ServLib\Local\Logos)</li> </ul>

<sup>4</sup> The article <http://knowledgebase.kofax.com/faqsearch/results.aspx?QAID=11224> describes where are located the KTM log files.

## 8.2.4 VRS

Information type	Information to Gather
Product Information	VRS Serial & Part Number
	Specify VRS or AIPE version numbers and SP's
Environment Information	Workstation OS Version and Service Pack Level
	Domain / local installation
Reproduction Scenario	Describe in detail the steps to reproduce the problem
Research	Link to the articles or web page that you have already been looking at <a href="http://knowledgebase.kofax.com/faqsearch/search.aspx">http://knowledgebase.kofax.com/faqsearch/search.aspx</a> <a href="http://support.microsoft.com/">http://support.microsoft.com/</a> <a href="http://forums.kofax.com/">http://forums.kofax.com/</a>
Data to Collect	<ul style="list-style-type: none"><li>• VRS license info – Screenshot of Activate.exe</li><li>• Scanner Brand &amp; Model</li><li>• Used scanner interface (SCSI, FireWire, USB)<ul style="list-style-type: none"><li>○ Adrenaline 850 or 1700</li><li>○ Adrenaline 450, 650 or 650i</li></ul></li><li>• Used Scan source</li><li>• Used Scanner &amp; VRS settings</li><li>• Sample images showing problems</li></ul>

## 8.3 How to retrieve Kofax Capture Serial Number

Expand the Programs shortcuts from the start menu and navigate to the Kofax Capture folder then select the *License Utility*. The license serial number is displayed at the bottom of the license utility window.

