Kapow Quick Start Guide (Basic Installation and Configuration)

Summary

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This Quick Start Guide is aimed at new Kofax RPA (Kapow) users and shows what the main steps are when installing and configuring the software.

Notes:

- The examples below use a Management Console (NOT deployed into Tomcat) and RoboServer that are on a different machine than Design Studio.
- This quick start guide assumes you have at least a non-production key that can be used to license a Management Console.
- All Kofax RPA (Kapow) documentation files can be downloaded from the User Guides section. After Kofax RPA (Kapow) is installed, the documentation files can also be found in the “Documentation” folder from the installation folder.

The basic procedure to deploy Management Console in a standalone Tomcat can be found in Knowledgebase article 12398.

1. Installing the software

a. Make sure that the system requirements are met. See “System Requirements” in the Installation Guide PDF. For versions 10.4 and later of Kofax RPA, the requirements are in their own Technical Specifications file (which can be found in the User Guides section).

b. Install the Kapow RPA (Kapow) software on the machines where you will use Management Console and RoboServer. Follow the “Install Kapow” section in the Installation Guide (for your OS)

c. Install the software on the machine where Design Studio will be running. You can use the installer that only installs Design Studio (since we’ll use Management Console for licensing)
2. Starting the Management Console and RoboServer

To start a Management Console and RoboServer in the same Java Virtual machine, run the following command (from the bin folder of the Kofax RPA (Kapow) installation folder)

- **On Windows**: `RoboServer -MC -p 50000`
- **On Linux**: `./RoboServer -MC -p 50000`

For Windows, there is also a "Start Management Console" link in Start -> Programs under the Kofax RPA (Kapow) version program group.

**Notes:**

- All RoboServer command parameters can be found in the Administrator Guide -> Runtime.
- Management Console can be reached on [http://ServerNameOrIP:50080](http://ServerNameOrIP:50080) (additional settings – e.g. different port, https use - can be done through the RoboServer Settings application (see sections 4 and 5 below)
- RoboServer can be started on different ports (50000 is the default)
- By default, Kofax RPA (Kapow) will register the RoboServer on the port specified in the command to this Management Console
- It is possible to start Management Console and RoboServer in separate JVMs, by running the RoboServer command with separate parameters (please refer to the RoboServer parameters in the Administrator Guide): "RoboServer –MC" will start Management Console only and "RoboServer –p 50000 –mcUrl http://ServerName:50080 –cl "Production" will start a RoboServer on port 50000 and register it to the Management Console at ServerName:50080 under the “Production” cluster.
  - A Kofax RPA (Kapow) environment always has **ONE** Management Console that can control **MULTIPLE** RoboServers. You should never configure multiple Management Consoles to control the same RoboServer
  - It is possible to configure Management Console and RoboServer(s) to start automatically. Please see the Installation Guide -> Kapow Initial Configuration for more information.

3. Accessing Management Console and entering the license key

- Access Management Console on [http://ServerNameOrIP:50080](http://ServerNameOrIP:50080)
- The first time you access MC, it will prompt for the license key:
Make sure that the keys and Company match exactly the data you received from Kofax. The license data can later be replaced in Management Console -> Admin -> License tab.

Note: You can click the Help icon ( ) on any tab to get more information about it. The icon is usually on the top right hand corner.

4. Configure Management Console settings (port, authentication, etc)

Management Console security settings are configured from the RoboServer Settings app (can be opened from the Kofax RPA (Kapow) group in Start -> Programs or from the bin folder in the installation folder).

It is VERY important that this app is run as the user that runs Management Console. Otherwise, the changes will not be applied.

E.g. the RoboServer Settings app above is running for user “Batman”. If another user is running the Management Console process (RoboServer –MC), any changes done above won’t be applied.
4.1. Changing Management Console port: change “HTTP Port Number”

- On the “Management Console” tab, edit the “HTTP Port Number”

4.2. Enable Management Console authentication (this is optional):

- On the “Management Console” tab, select “Enable user Management”
- Enter the Admin username. This is your initial admin user; you can add additional users and create groups later from the Management Console itself.
- Click “Enter password” and set the admin’s password (can be changed later).

Note: If “User Management” is enabled, please check the documentation for the correct way to set the RoboServer to register to this MC (Admin Guide -> Runtime -> Start RoboServer).

4.3. JDBC Driver Upload

By default, only an admin user is allowed to upload a JDBC driver and only while accessing the Management Console on the machine it’s running (localhost). If you are accessing the Management Console from a different machine and need to upload JDBC drivers (to use with databases), change this option to “Admin from any host”

You can find more detail information (including information about the other tabs in the RoboServer Settings app in the Administrator Guide -> Runtime)

Keep in mind that the Management Console /RoboServer process has to be restarted for changes done in RoboServer Settings app to take effect.

5. Management Console with Authentication

When authentication is set up (see section 4.2 above), the Management Console will prompt you for a user and password when loading:

Initially, enter the user and password set in RoboServer Settings.
When you are logged in, the user will be shown in the top right corner:

![User display](image)

To compare, this is how this area looks like when there is no authentication set up:

![No authentication](image)

### 5.1. Creating users and groups

New users and groups (and assigning users to groups) is done from Management Console -> Admin -> Users&Groups.

**Please Note** that there is no connection between users/groups and your Active Directory / LDAP /Domain users and groups. E.g. if a user changes their domain password, this will have no effect on the user credentials used on Management Console.

It is possible to integrate Management Console with LDAP; this is an advanced configuration and only works when Management Console is deployed as an application in a stand-alone Tomcat web server and this Quick Guide doesn’t cover this setup. You can find more detail information in the Admin Guide under “Tomcat Management Console”.

### 5.2. Adding users to groups

There are two options:

- Select a user, click “Edit user” and use the arrows to add the groups is which it should be a member:

![Edit user](image)

- Select a group, click “Edit Group” and use the arrows to add its members:
5.3. Assigning rights to users

Very Important:
A user created in the Management Console will be able to log in to the Management Console only if it is part of a group that has been assigned rights to at least one project.

To assign rights to projects, follow these steps:

- Go to Management Console -> Admin -> Projects
- Create the project or open its properties by clicking the "Edit" icon
- Go to the “Permissions” tab Click “Add Permission”.
- Select “Project Role” from the drop-down:

Please see Knowledgebase article #20434 for a description of the roles.

- Select the group from the Security Group drop-down:
6. Management Console configuration before running robots

6.1. Databases JDBC drivers

Fofax RPA (Kapo)w has a default database that can be used for logging (logdb) and for robots to store data (objectdb). To use this database, you have to start it from the Kofax RPA (Kapow) program group under (Start -> Programs) using “Start Development Database”. An executable can be found in the bin folder (in the installation folder) too.

If you want to use a custom database (which is recommended even when testing), do this first:

- Check the Installation Guide -> Supported Platforms (or the Technical Specifications file for versions 10.4 and later) to see the database systems that are supported.
- Get the JDBC driver for the database. Kofax doesn’t provide these drivers but you can download them from the database provider (e.g. Microsoft, Oracle etc.)
- Upload the JDBC driver in the Management Console -> Admin -> Settings -> Database Drivers by clicking “Upload Driver Jar” button.
Note: You might see that the “Upload Driver Jar” button is disabled:

This is because you’re accessing the Management Console from a different machine than the one on which it is running and you haven’t changed the setting to allow driver upload from a different machine. See section 4.3 above and change the “JDBC driver upload” to “Admin from any host”, restart Management Console (the process itself) and the “Upload Driver Jar” button will be enabled.

- Click “Save” to save the JDBC driver in Management Console. You will see it listed under “Database Drivers”.

It is possible to use multiple types of databases in the same Management Console, just upload the driver they should use.

6.2. RoboServer Log Database

By default, the RoboServer Log Database in set to logdb (and this can be accessed if you start the Development database only):
You can configure this to a custom database. If the user you provide has rights to create tables in this database, Management Console will create all the tables it needs.

If the user can’t create tables, a DBA will have to create them before the database is configured as RoboServer Log Database. See “SQL Scripts for Kapow tables” to get the queries needed to create the log tables (make sure you get the one for the type of database you’re planning to use).

Starting with version 10.0, the SQL scripts can also be found in the Kofax RPA (Kapow) installation folder -> documentation -> sql -> logdb.

Your user needs to be able to write to these tables.

After the RoboServer Log Database is configured, you can see all the logs in the Management Console -> Logs tab.

**6.3. Harvest Database**

Robots can store data in databases or query tables for data. By default, objectdb is used (Development Database).

To use a custom database, follow these steps:

- In Management Console, go to Admin -> RoboServers and open Cluster Settings (click the icon or right click on the cluster to see the option):

  ![Cluster Settings](image)

- Click “Databases” and then “Add a Database”:

  ![Add Database](image)

- Fill in the information, click “Test” to make sure Management Console can reach it and “OK” to save.
**Note:** “Name” is the name of the mapping, not the database (you will need the database actual name in the “Schema”). The mapping name can be different from the database name and you can keep it different if you don’t want robot developers to know the real name of the database. If there isn’t a security problem, you can keep the mapping name same as the database name (less confusion).

Data stored by robots in this database can be viewed from Management Console -> Data tab. Only tables created from types will be shown.

E.g. if a table is created in SQL Manager, you won’t see it here (even if you have robots configured to query it or add/change data in it).

### 6.4. Shared Databases (between Management Console and Design Studio)

Management Console can push database mappings created under Cluster Settings to Design Studio instances. If you have multiple clusters, only one cluster can push database mappings.

To configure Shared Databases, follow these steps:

- Select which clusters will push the databases: go to Management Console -> Admin à Settings -> Design Studio -> Shared Databases:

- Create your database mappings under Cluster settings (see the previous section, 6.3)
• Assign database mappings to projects:
  ◦ Go to Management Console -> Repository -> Databases and click “New Database Mapping”
  ◦ Fill in the information:
    ▪ Mapping Name can be the same as the “Name” given when creating the mapping in Cluster Settings (it can be different too, but this might bring in more confusion)
    ▪ Project: set this to the project where this mapping will be used
    ▪ Cluster has to be the one you’ve already set for “Shared Databases”
    ▪ Database Configuration: select the mapping created in Cluster Settings from the drop-down. After you save these settings, the users that have Design Studio connected to this Management Console can right click on the Management Console connection under “Databases”, select “Refresh” and they will have the mapping available:
      ◦ After you save these settings, the users that have Design Studio connected to this Management Console can right click on the Management Console connection under “Databases”, select “Refresh” and they will have the mapping available:
7. Building Robots

Robots are built in Design Studio. Please see the Installation Guide -> Providing License information -> Design Studio for more information on how to start Design Studio and configure a license for it.

Then see the User’s Guide for Tutorials and more information about building robots. From any step in Design Studio you can click the help icon ( ) to open the help and read more information about that specific step.

Design Studio also has a default project (its name is the name of the version; e.g. 10.0.3_18) where you can find robot examples for usual operations.

8. Uploading Robots

Robots can be uploaded easier from Design Studio, by right clicking on the robot and selecting “Upload”:

In the new dialog box, select the Management Console and the Project where the robot should be uploaded:

You cannot create a project from this dialog; it has to be created in the Management Console (-> Projects) in advance.
When using this option, you only need to select the robot and Design Studio will also send all the types and snippets that it uses.

You can share a project between Management Console and Design Studio by selecting “Remember this (as a shared project)”. You can find more information about Shared projects and how to work with them in the User’s Guide -> Projects and Libraries.

You can also upload the robot files directly to Management Console but you will have to select the robot and each type and snippet one by one. Go to Management Console -> Repository and you will see the “Add” buttons on each tab (Robots, Types, Snippets).

9. Running robots

9.1. Running robots from Repository

Each robot in Repository has a “Run Now” icon ( ). However, only robots that don’t require input can be run using this. If your robots require input, they can only be run through a schedule (by Management Console), API or REST/SOAP – see the next sections for more information.

If you have multiple clusters, you will be asked to select a cluster on which to run:

9.2. Running robots from a Schedule

You can create a schedule from the Management Console -> Repository -> Robots tab by right clicking on a robot and selecting “Create Schedule”:

This will automatically add the robot to the schedule.
The other option (easier to use when you want to add multiple robots to a schedule) is to use the “Add” button on the Management Console -> Schedules tab.

9.3. Running Robots via API

You can see the icons for API in Management Console -> Repository -> Robots:

Clicking on this will open the sample code for Java and .NET APIs that you can use to call this robot.

More information can be found in the Developer’s Guide in the documentation.

9.4. Running robots using REST/SOAP

Click on the REST/SOAP icons ( ) in Management Console -> Repository -> Robots to get a service example that you can use to call that specific robot.

10. Performance graphs in Management Console

Performance Graphs are deprecated and have been removed in v 10.3.1 and later.

Please use Kofax Analytics for Kapow (Kofax Analytics for RPA) for statistics data.

Management Console has a few basic performance graphs on the Dashboard tab.

By default, only the most used ones are open but you can open additional ones by selecting them in the dropdown and clicking “Add”:

More types of graphs are available when using Kofax Analytics for Kapow (this is a separate software that you can purchase, please contact your sales representative to get more information)