

TECHNICAL TRAINING LAB INSTRUCTIONS

In this lab you will learn how to send an email using activity notification when an activity becomes pending. You will also learn how to send an email using the Email activity. In addition, you will also learn how to automatically create a document using a Microsoft Word template.

Lab 13-1

Activity Notification and Document Creation

View Activity Notification

In this part, you will view how an activity has been configured for email notification.

1. From the **Main** menu navigate to **Workflow > Case definitions**, and open the **Loan Application** case definition.
2. Select the **Loan Approval** activity, and from the **Properties** panel, select the **Resource assignment** tab.
3. Notice that the **Approving Officers** group is assigned to the activity.
4. Locate the **Notification email** properties.
Note: The Subject, Message and URL have been completed for you.

Notification email

Send email ☒

Send to

Subject

Message

URL

Append associated file ☒

5. Notice the various email options. You can edit the Subject, Message and URL of the email. You can use variables to hold the email content, and can choose to send the email to a group email address or the individual group members.
Note: The URL to take the activity will appear in the email body. The link however will not redirect the user to the activity without additional implementation. We will not implement this functionality in this class.
6. Steps 7-9 are for information purposes only, you do not need to complete any lab steps.

TECHNICAL TRAINING LAB INSTRUCTIONS

7. The values of the email variables are shown below:

Name	ID	Type	Value
Approval Body	APPROVAL_BODY	String	Use the following link to approve or reject...
Approval Email Subject	APPROVAL_EMAIL_SUBJECT	String	A Loan Requires Approval
Approval URL	APPROVAL_URL	String	http://localhost/TotalAgility/forms/xyzbank

8. The **Approving Officers** group contains the following members:

Edit group resource

General * indicates a required field

Name*

Category*

Email address

Supervisor

Group members [Add](#)

Frank Myers (Individual) × Sharon Smyth (Individual) ×

9. **Sharon Smyth** has an email address configured: ssmyth@kofax.com.

Edit individual

General * indicates a required field

Account Full name*

Organization Username*

Membership Password

Confirm password

Advanced Email address

Lab 13-2

Email Activity

Configure the Email Activity

In this part, you will learn how to send an email using the Email Activity.

1. Select the **Email Forms** activity.
2. In the **Properties** panel, from the **Type** dropdown, select **Email**.
3. Click the **Edit** icon (pencil) in the **From** field, and from the dropdown, select **Email From** (Process variable).
4. **Right-click** on relevant fields as populate with process variables as shown below:

TECHNICAL TRAINING LAB INSTRUCTIONS

> Activity - email forms

Name: Email Forms

Type: Email

Configuration

From*: Email From (Process variable) ×

Right click to add dynamic content

To*: Email To (Process variable) ×

CC List

BCC List

Subject*: Email Subject (Process variable) ×

Attachments

Importance*: Normal

Format*: Text

Body*: Dear First Name (Process variable) ×
Email Body (Process variable) ×

Notes: (i) You can create an *inline* template for emails using a combination of text and variables.

(ii) You can send an email to *multiple* recipients.

(iii) Email From contains TotalAgility@kofax.com, Email To contains ssmyth@kofax.com

5. We will not add an attachment.
 6. Leave the default **Importance** and **Format** settings.
 7. For the **Body** section, you can mix variables with manually typed text.
 8. You can check the values of the variables used in the email activity by selecting **Variables** on the **Ribbon**.
 9. **Save** the process.
- Note:** We will test Activity Notification and the Email Activity in a later lab.

TECHNICAL TRAINING LAB INSTRUCTIONS

In this lab you will learn how to generate a Microsoft Word document from an existing Word Template.

Lab 13-3

Document Creation Activity

Add a Document Creation Activity

In this part, you will replace the **Generate Confirmation Letter** activity with an automated document creation activity. The Word templates used in this lab are already held in the Store (TotalAgility documents database).

1. Select the **Generate Confirmation Letter** activity.
2. In the **Properties** panel, from the **Type** dropdown, select **Document creation** (Other group).
3. Check the **Load document template from store** checkbox.
4. From the **Document template name** dropdown, select **LoanConfirmation.dotx** (Default Category).
5. Leave the **Format** at **Document**.
6. From the **Document save location** dropdown, select **LOAN CASES ROOT FOLDER** (this is a Server variable in the **Personal Loan** category). The variable contains the value C:\LoanCases\
7. From the **Name** dropdown (document name), select **Last Name** (Process variable).
8. Check the **Overwrite existing document** checkbox.

TECHNICAL TRAINING LAB INSTRUCTIONS

Activity - generate confirmation letter

Name:

Type:

Configuration

Load document template from store: ☒

Document template name:

Format:

Document save location:

Name:

Overwrite existing document: ☒

9. In the Template placeholder area, populate the Word template merge fields with process variables as shown below:

Template placeholders

Placeholders	Mapping
CaseRef	<input type="text" value="CASE_REFERENCE (Process variable)"/>
CustomerNa...	<input type="text" value="First Name (Process variable)"/>
LoanAmount	<input type="text" value="Loan Amount (Process variable)"/>
Creditscore	<input type="text" value="Credit Score (Process variable)"/>
CaseOwner	<input type="text" value=""/>

Note: You can ignore CaseOwner.

10. **Release** and **Close and unlock** the process.

Lab 13-4

Test Activity Notification, Email Activity, and Document Creation

Test Activity Notification, Email Activity, and Document Creation

In this part, you will test that email notification and document creation is working. You will also confirm that the credit score that you retrieved in an earlier lab is also displayed on the Loan Approval form.

1. Open the **browser** and click the shortcut on the toolbar menu to logon to the **xyzbank** site.
2. Logon as **jpike**.
3. Select **Loan Applications > New**.
4. Leave all default values and set **Case Reference = RD001**.
Note: the values should be **Customer Id = 1**, **First Name = Robert**, **Last Name = De Niro**, and **Loan Amount = 5000.00**
Note: Remember the Case Reference must be unique, so if an error displays, you may want to complete a **Job Clear Down** before completing this step.

LoanApplication	
Customer Id	1
First Name	Robert
Last Name	De Niro
Loan Amount	5000.00
Loan Application Document Id	
Case Reference	RD001
<div>Create Case Cancel</div>	

5. Click **Create Case**. Once the case has been created, you will return to the Work Queue.
6. Open a new tab in the browser and log on as **ssmyth**.
7. The **Loan Approval** activity should be pending. The **Credit Check** activity should have completed, and the activity notification email will have been sent to ssmyth@kofax.com and fmyers@kofax.com (leave the case details screen open).
8. Open **Mozilla Thunderbird**, the email should be received regarding the Loan Application.

From: Me <TotalAgility@kofax.com> ⭐

Subject: A Loan Requires Approval

To: Me <fmyers@kofax.com> ☆, Me <ssmyth@kofax.com> ☆

Use the following link to approve or reject the Loan.
<http://localhost/TotalAgility/XYZBank/?jobid=E690E49F68F44F15BFABEB82F267CCA0&nodeid=3&EPC=0>

Note: The hyperlink in the email will not work. Extra configuration is required to make this link work. You will not configure the link to work in this course.

TECHNICAL TRAINING LAB INSTRUCTIONS

- Navigate back to the **ssmyth's** work queue and click the **Loan Approval** activity name hyperlink to take the activity.

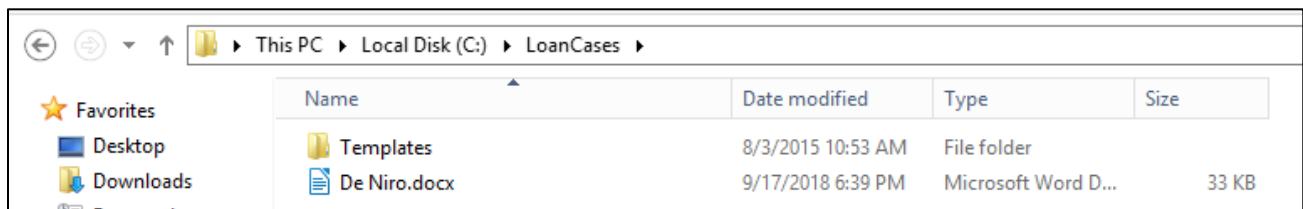
Loan Approval	Loan Application	1	8/15/2018 10:08:03 AM
---------------	------------------	---	-----------------------

- Review all the loan information, select the **Approved** checkbox, and click **Complete**.

Loan Approval
 Please ensure you click the Approved checkbox to approve the loan.

Information	
Creditscore	10
Customer Id	1
First Name	Robert
Last Name	De Niro
Loan Amount	5000
Loan Application Document Id	
Requested	
Approved	<input checked="" type="checkbox"/>

- Using **File Explorer**, view the file that was created by the automatic **Generate Confirmation Letter** activity with the following path: C:\LoanCases\De Niro.docx.



- Open the document (read only) and ensure that the document contains the merged process variables.
- Close** LibreOffice.
- Navigate to **jpikie's** work queue (click Refresh).
- The next pending activity will be **Post Forms**.
- The **Email Forms** activity has already completed automatically.
- From **Mozilla Thunderbird**, another email should be received regarding the Loan Application (ssmyth's mailbox).

TECHNICAL TRAINING LAB INSTRUCTIONS

From: Me <admin@kofax.com>☆
Subject: XYZ Bank Personal Loan Confirmation
To: Me <ssmyth@kofax.com>★
Dear Robert
Your loan application has been authorized and your funds will reach your nominated personal account in 5 working days.
We would like to take this opportunity to thank you for choosing XYZ Bank, and hope you will take a look at some of our other great products.
Yours
Sharon Smyth
Loan Approval Officer

18. **Close** Mozilla Thunderbird.

Lab Notes

Email Server Settings

1. The Email activity uses email server settings. These are configured after installation in Lab 02. The following are the server email settings that have been configured.

Note: The password is: W0rkstation (Capital W and then a zero).

2. From the **Main** menu navigate to **System > System settings**, and from the **System** card, click **Email server (SMTP)**.

Configure Email Sender for Activity Notification

You can configure the system email address that Kofax TotalAgility uses to send emails when the Activity Notification feature is used. Note that you could have used the system server variable for the From field when configuring the email activity.

3. From the **Main** menu navigate to **System data > Server variables**.
4. From the **Category** dropdown, select **System Category**.
5. Note that the **SYSTEM_EMAIL_FROM** variable Value is set to TotalAgility@kofax.com and **SPP_SMTP_SERVER** is set to **localhost**.

SYSTEM_EMAIL_FROM	String	TotalAgility@kofax.com
-----------------------------------	--------	------------------------

Document Creation

6. You can create merge fields in a Microsoft Word template (.dotx) using **Insert > Quick Parts > Field** and selecting **MergeField**.
7. You can also store the generated Document in the Kofax TotalAgility Database by using a Variable of Type = **Document**. You can use the **Image Processing (Capture)** activity to

TECHNICAL TRAINING LAB INSTRUCTIONS

convert this to a **tiff** file and use the export features to export as a **PDF** if required.

8. The document name is set to the Customer Name in this example. In practice we would need to generate a unique document name for each application as multiple documents could be created for the same customer.

Revision Questions

1. What is activity notification?

2. You would use the email activity if you needed to?

3. What would you need to do if you needed to change the From address when using the Notification email feature?

4. Is it possible to mix and match process variables and static text when designing the subject line and body of an email activity?

5. Where do you define SMTP settings in order to send an email from TotalAgility to an SMTP server?

6. You must install Microsoft Word on the server in order to use the Document Creation feature?

7. The Document Creation activity can be used to generate a Microsoft Word document in a file location or a reference to the document in a Document variable?

8. Microsoft Word templates must be added to the Store in order to use the Document Creation activity?

9. Can the Document Creation activity be used to generate HTML for use in an email activity?

10. A Notification Email occurs when a pending activity is completed?
