

# Notifications and Document Creation

*Work Like Tomorrow.™*

**KOFAX**

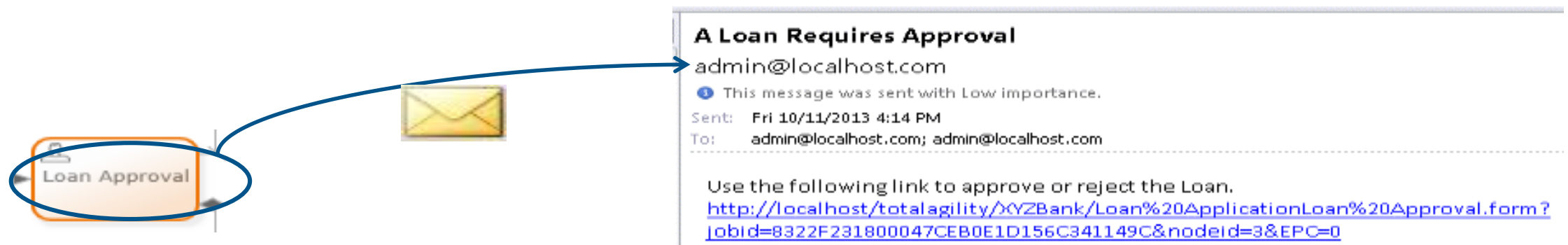
# Email



- Activity Notification
  - Send an email when an activity becomes pending
  - SYSTEM\_EMAIL\_FROM variable must be populated with an email address, this email address must have sufficient rights on the SMTP Server (TotalAgility@kofax.com)
- Email Activity
  - Send an email (not connected to a pending activity notification)
- SMTP Server Configuration (System Settings) (These were configured in Lab 2)

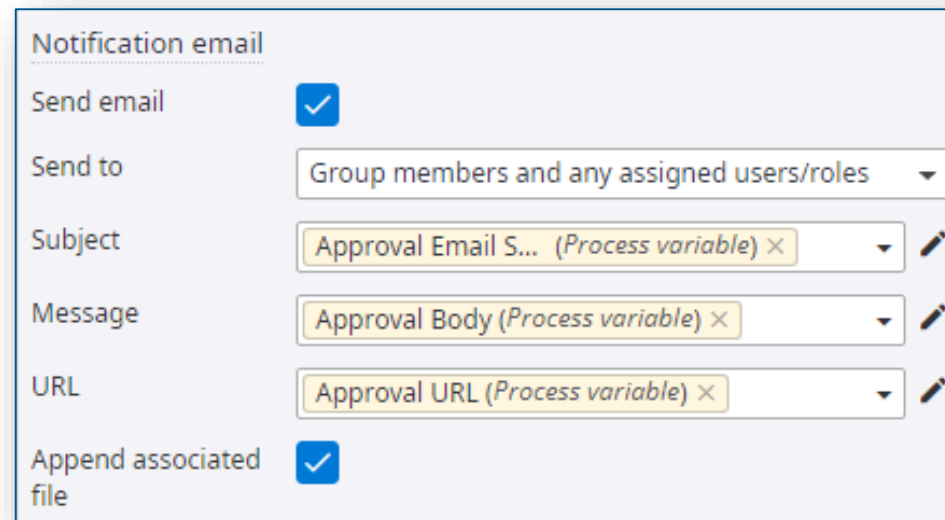
# What is an Activity Notification?

- Activity Notification is about notifying a resource via email that an activity is ready for them to take, i.e. work is pending
- You can create the subject and body of the email
- You can embed a URL in the email that launches the browser and takes the user directly to a web page where they can complete their activity
- If you set the Activity Notification at the map level, then any manual activities added thereafter inherit the settings



# Configuring Activity Notifications

- Select the relevant activity
- Select the **Resource assignment** tab
- Check **Send email** in the **Notification email** area
- Enter **Subject**, **Message**, and optional **URL**



The screenshot shows a configuration window titled "Notification email". It contains several settings:

- Send email:** A checkbox that is checked with a blue checkmark.
- Send to:** A dropdown menu showing "Group members and any assigned users/roles".
- Subject:** A text field containing "Approval Email S..." followed by "(Process variable) ×". There is a small edit icon (pencil) to the right.
- Message:** A text field containing "Approval Body (Process variable) ×". There is a small edit icon (pencil) to the right.
- URL:** A text field containing "Approval URL (Process variable) ×". There is a small edit icon (pencil) to the right.
- Append associated file:** A checkbox that is checked with a blue checkmark.



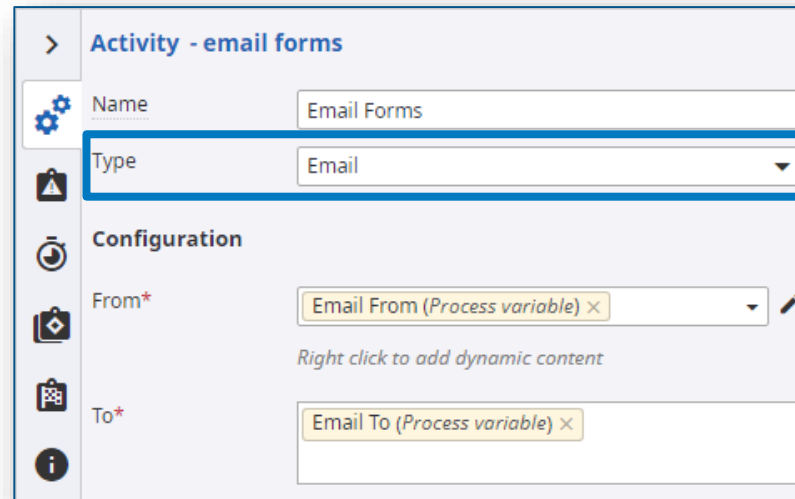
Ensure that the resource is configured with an *email address* (via the Resources module)

# What is the Email Activity?

- The Email activity is an automatic activity that is used to send emails via any SMTP compatible server e.g. Microsoft Exchange
- Typically, you would use the E-mail activity wherever you wish to send internal (e.g. TotalAgility resource) and/or external emails (e.g. to a customer, or where the recipient is a non-TotalAgility resource)
- You can use either static text or Kofax TotalAgility process/server variables (for dynamic emails) to specify e-mail attributes, such as sender, recipient, subject, body, CC list, BCC list, attachments, importance, and format

# Adding an Email Activity

- Add an ordinary activity
- Change the **Type** property to **Email**
- Locate the **Configuration** area



> 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) ×

# Activity and Email Notifications

- Right click in the relevant field and select variable and/or type values into the textboxes

> Activity - email forms

Name Email Forms

Type Email

Configuration

From\* Email From (Process variable) x  
Right click to add dynamic content

To\* Email To (Process variable) x

CC List

BCC List

Subject\* Email Subject (Process variable) x

Attachments

Importance\* Normal

Format\* HTML

Body\* Dear First Name (Process variable) x  
Email Body (Process variable) x



You can send emails to *multiple* participants

# Activity Notification Settings

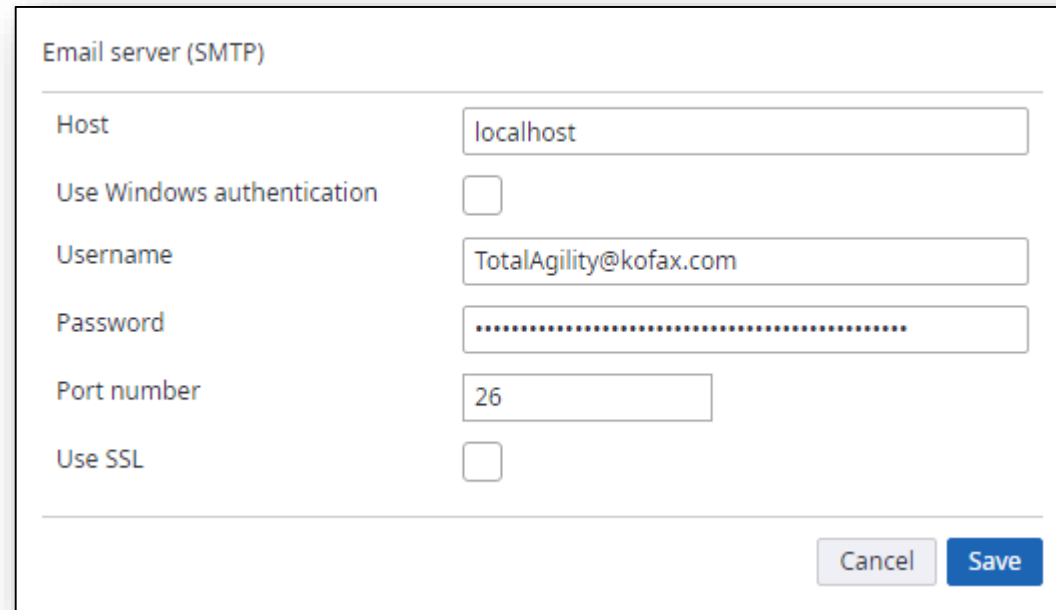
- Activity Notification Email is handled using a dedicated system map called SYSTEM Process Email Activity
- The following Server variable can be modified:

Server Variables	Default Values
SYSTEM_EMAIL_FROM	TotalAgility@kofax.com



# Configuring Server Email Settings

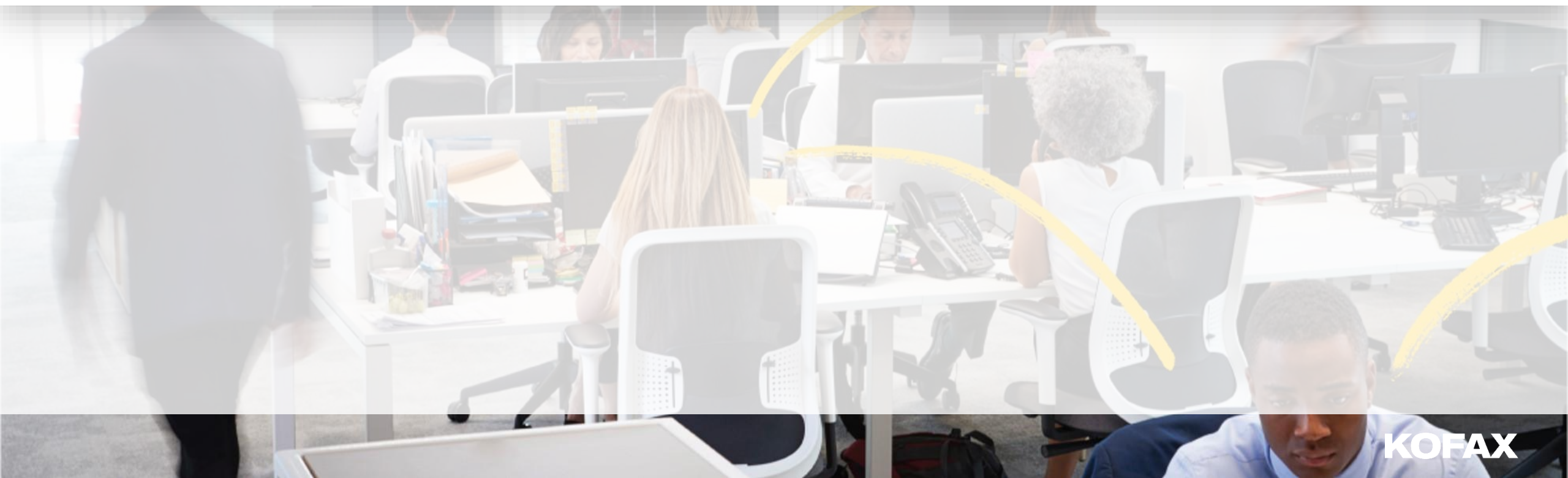
- From the **Main** menu navigate to **System > System settings**
- Select Email server (SMTP) in the System card
- Enter the **SMTP** details



The screenshot shows a configuration window titled "Email server (SMTP)". It contains several input fields and checkboxes. The "Host" field is set to "localhost". The "Use Windows authentication" checkbox is unchecked. The "Username" field is set to "TotalAgility@kofax.com". The "Password" field is masked with dots. The "Port number" field is set to "26". The "Use SSL" checkbox is unchecked. At the bottom right, there are "Cancel" and "Save" buttons.

Email server (SMTP)	
Host	localhost
Use Windows authentication	<input type="checkbox"/>
Username	TotalAgility@kofax.com
Password	.....
Port number	26
Use SSL	<input type="checkbox"/>
<div>Cancel Save</div>	

# Document Creation



# Document Creation



- Word 2007 or above
  - No need to install on server as uses Office Open XML
- Creates a new document (.docx) by merging variables in a process to merge fields in a word template (.dotx)

# What is Document Creation?

- TotalAgility enables you to automatically generate Word documents using a specified server template
- Document Creation activity is an automatic activity that is used to create Word documents within a process
- You can specify which Microsoft Word template is to be used, and what placeholders are to be populated to create the document e.g.<DATE>, <COMPANYNAME>, etc



At run time process data is merged to the specified placeholders

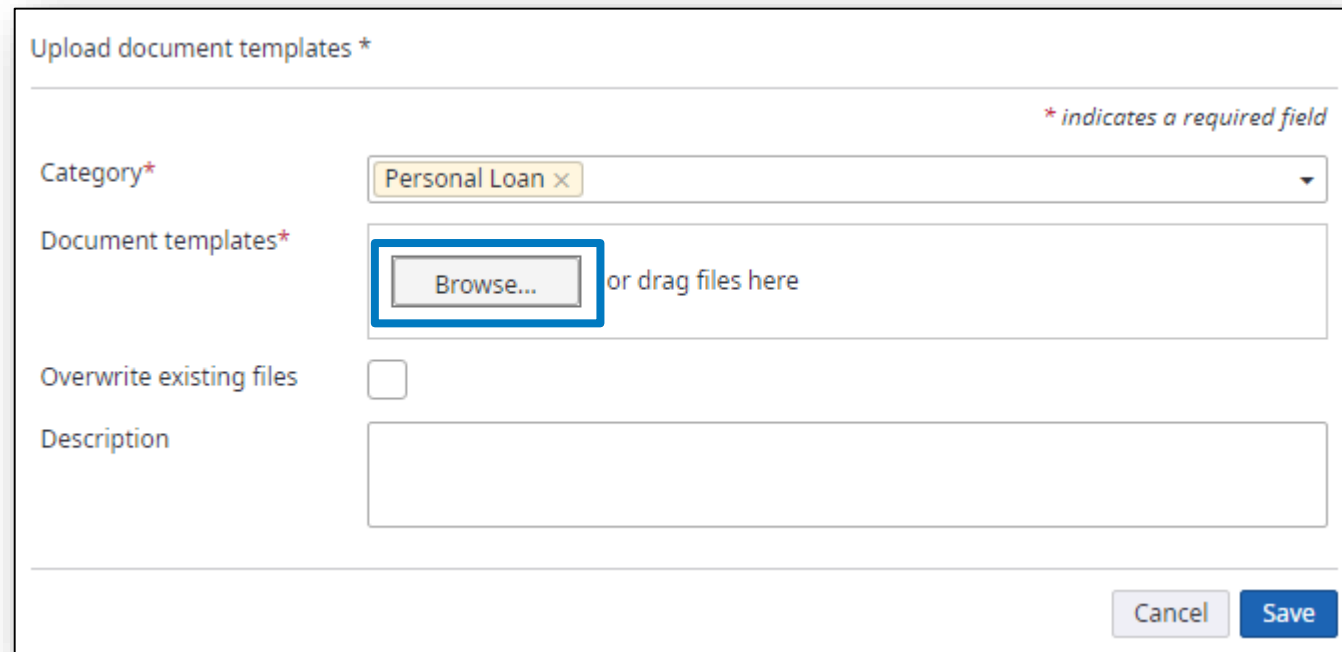
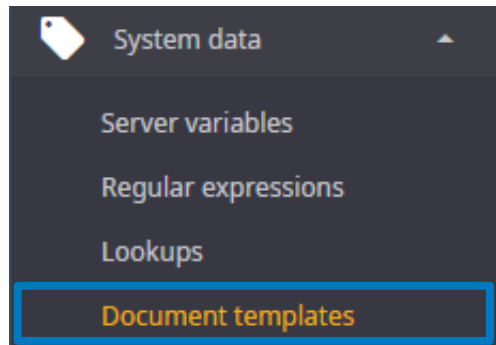
# Why use the Document Creation Activity?



- Helps you *automatically* create form letters, faxes and other custom documents by specifying the template to be used in TotalAgility (this saves time and resources)
- Enables you to generate a Word document even on the server that may not have Word installed on it
- Enables you to dynamically populate tables in a document

# Add a Document template to the Store

- From the **Main** menu navigate to **System data > Document templates** and click **New**
- **Browse** to the Template on the filing system and click **Save**

A screenshot of a web form titled 'Upload document templates \*'. The form includes the following fields and controls:

- Category\***: A dropdown menu with 'Personal Loan x' selected.
- Document templates\***: A large text area containing a 'Browse...' button (highlighted with a blue border) and the text 'or drag files here'.
- Overwrite existing files**: An unchecked checkbox.
- Description**: A large empty text input field.

At the bottom right of the form are 'Cancel' and 'Save' buttons. A red asterisk with the text '\* indicates a required field' is located in the top right corner of the form area.

# Adding a Document Creation Activity

- Add an ordinary activity
- Set the **Type** property to **Document creation** (Other grouping)
- Locate the **Configuration** area
- Select a **Document template, Format, Save location, Name**
- You can map merge fields (Template placeholders) in the template to process variables
- You can overwrite an existing document (if it has the same name)
- You can store the merged document back in the TotalAgility\_Documents database by using a Document variable type (you must also provide a folder variable)

# Adding a Document Creation Activity

**KOFAX** Online Banking

Ref: «CaseRef»

Tuesday, February 05, 2019

Dear «CustomerName»

We are pleased to inform you that your loan has been approved for the value of «LoanAmount».

Based on your credit score of «Creditscore».

Please sign the bottom of this letter and return to the above address within 14 days. Upon receipt of this letter and any additional information requested, the funds will be transferred into account.

Yours sincerely

**KOFAX** Online Banking

Ref: ANTHONYCROUCH

Tuesday, February 05, 2019

Dear ANTHONY

We are pleased to inform you that your loan has been approved for the value of 3500.

Based on your credit score of 10.

Please sign the bottom of this letter and return to the above address within 14 days. Upon receipt of this letter and any additional information requested, the funds will be transferred into account.

Yours sincerely