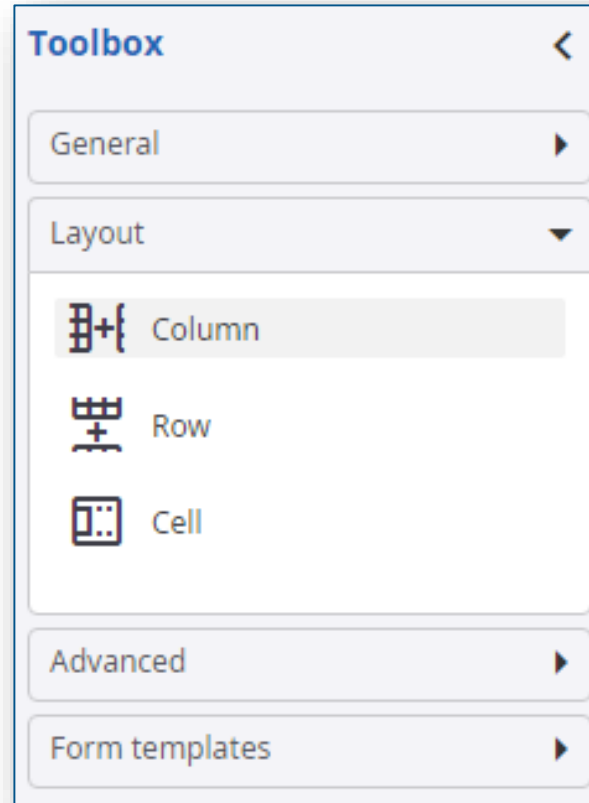# Customize Forms

Overview

- Save, Release, and Revert
- Controlling Form Layout
  - Rows, Columns, Cells
  - Moving controls
- WYSIWYG
- Adding Form Controls
  - Textbox
  - Dropdown
  - Web Capture
- Form Events
- Adding/Editing Form Actions
  - Action Types
- Training Scenario
- Self Learning
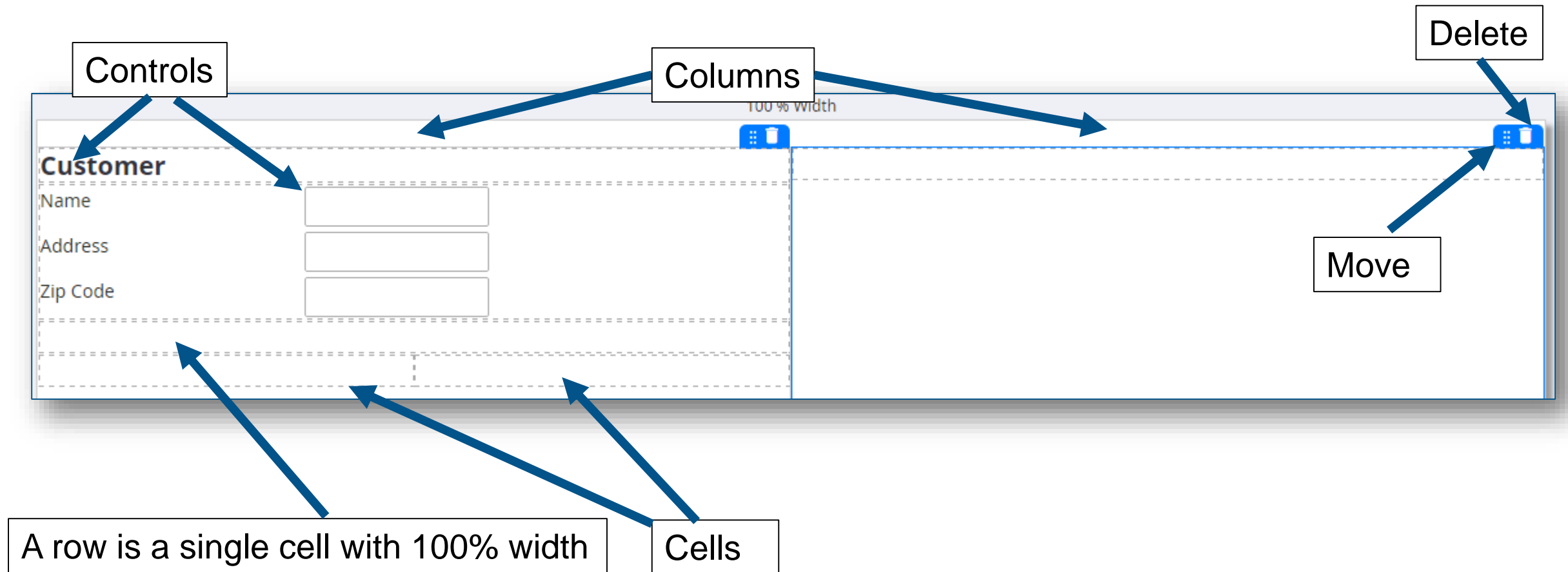
KOFAX

Saving, Releasing, and Reverting Forms

- Forms have **versions**

- You can Save (minor version) or Release (major version)

- All sites use the latest **Released** version of the form

- Forms are stored in the TotalAgility Database as XML and rendered at runtime as HTML/JavaScript pages

- On release you can refresh the browser page by clicking on the page and pressing F5 or CTRL + F5 (do not use cache)

- Can **Revert** to previous version of a form

Add Rows, Columns, Cells using the Toolbox

- Open the form
- Click Layout in the toolbox
- Click Row in the toolbox
- Select the row
- Click Cell in the toolbox
- Add a new row
- Click Column in the toolbox

Add Rows, Columns, Cells using the Toolbox

Controls

Columns

Delete

Move

Customer

Name

Address

Zip Code

100 % Width

A row is a single cell with 100% width

Cells

KOFAX

Form Layout

- A form can consist of a number cells that can be used to layout the controls on the form

- You can add rows (single cell that spans the form width), columns, and cells

- By default, forms use a Percentage Width mode (100%)

- Rows will shrink by default if there is no content

- You can change the orientation of a cell so that controls appear horizontally rather than vertically aligned

- You can change the width of cells

- You can set the Collapsed and Collapsible properties of a cell

KOFAX

Form Layout

WYSIWYG

- The forms designer is WYSIWYG
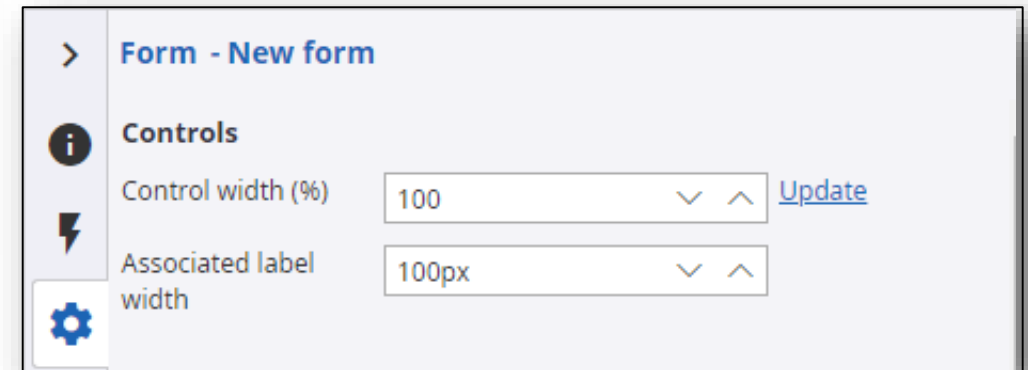- You will automatically see at design time what the form will look at run-time in a browser
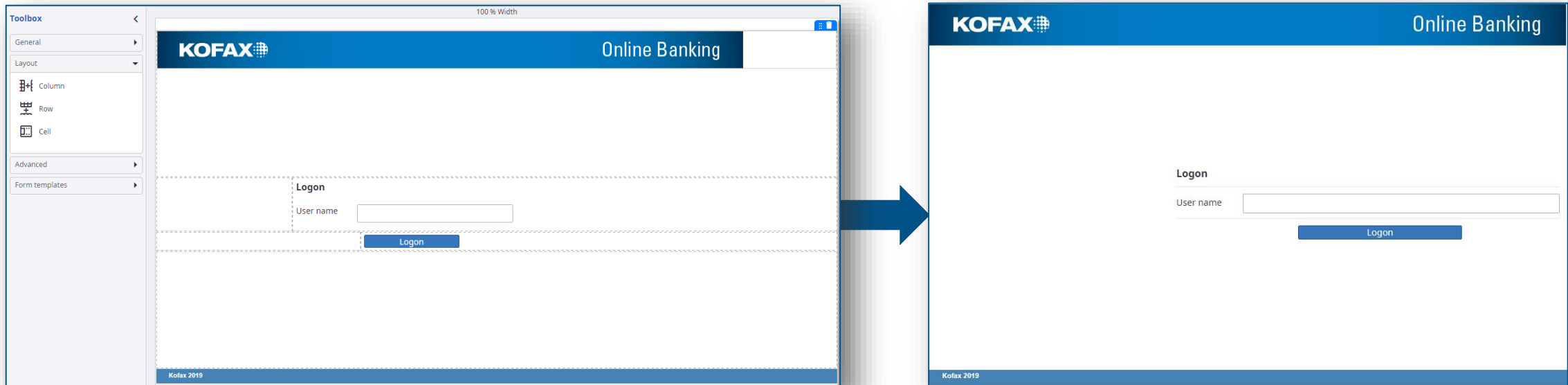
Form Properties

- You can change form properties by selecting the form and locating the Properties panel
- Form name and title can be changed
- You can update all control widths and label widths using Form properties

Adding Form Controls from the Toolbox

- Select a cell
- Click on the relevant control in the toolbox
- Each control has Properties

- You can access additional controls by clicking on the Advanced toolbox
- You can define Form Templates (a collection of fields that you might need to add to multiple forms

Toolbox ‹

General ▾

abc Label

◰ Textbox

OK Button

☑ Checkbox

⊞ Table

⬚ Dropdown list

📅 Calendar

◉ Radio button list

▭ Tab

🔗 Hyperlink

🖼 Image

◐ Chart

KOFAX
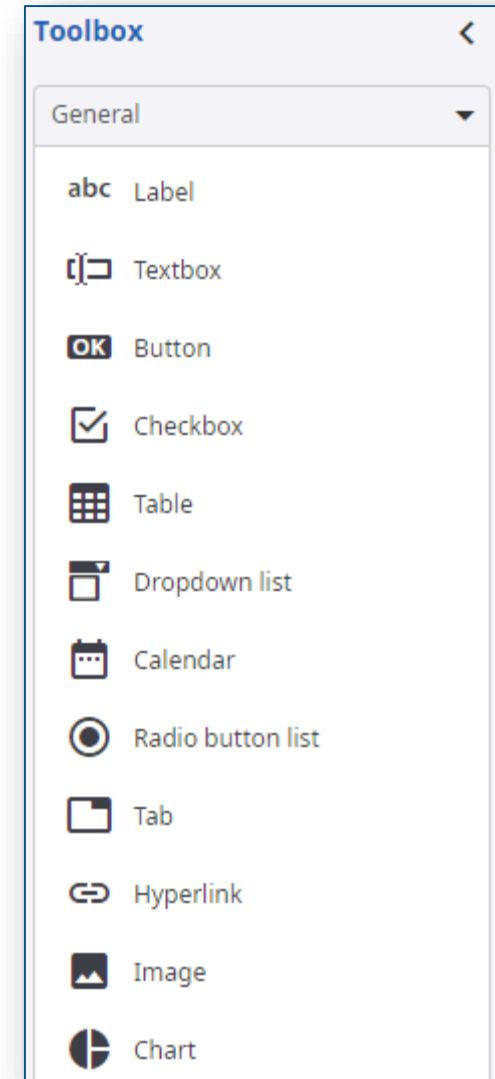
Control Properties

- You can modify a controls properties e.g. a Textbox by selecting the control and locating the Properties panel

- You can also select multiple controls using the **CTRL** key and set **Shared properties**
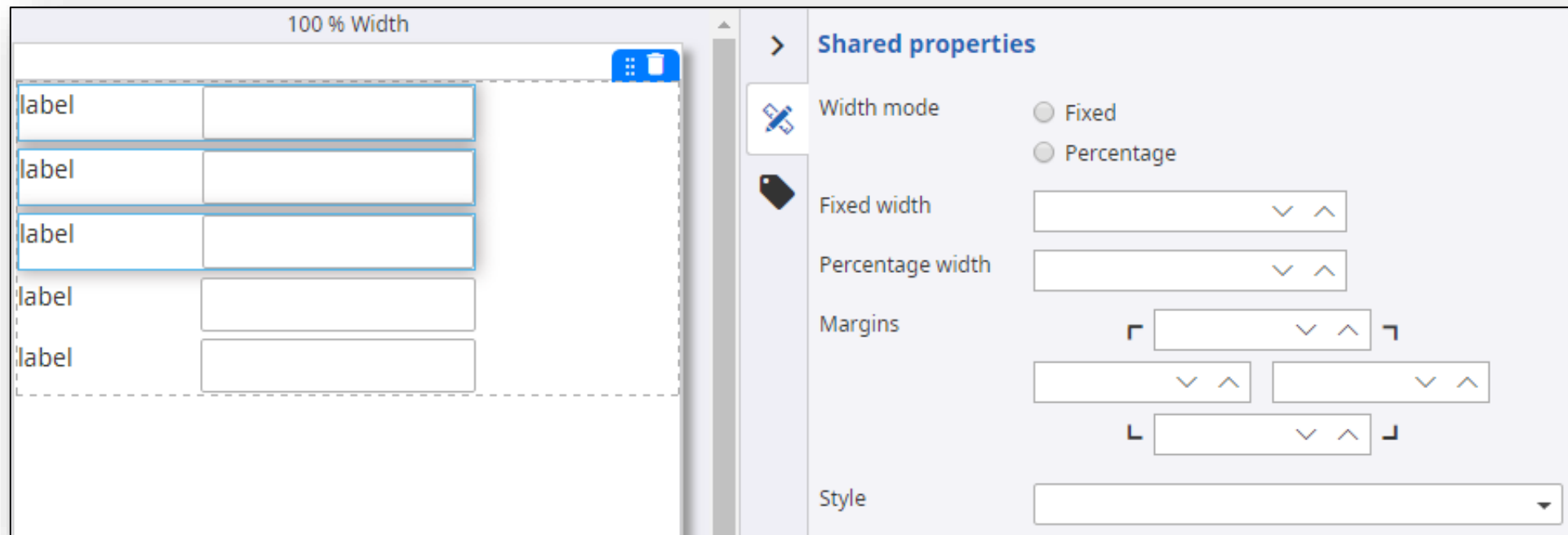
Events

- Most controls (and the form itself) have **events** that respond to a users action, e.g. clicking a button

- Multiple actions can be executed when an event occurs

- **Form Event**
  - Loaded - Fired just before the form is displayed

- **Control Events**
  - Clicked - Fired when the user clicks a button / image button
  - Selection changed - Fired when the user changes a text box, drop-down, check box, radio button, or calendar
  - Row selected - Fired when the user selects a row in a table

KOFAX

Action Types

- General
    - **Apply validation** - run validation
    - **Calculation rule** - runs a pre-defined calculation
    - **Change stack order** – change the order of stacked images
    - **Clear** - clears text box values
    - **Clear selection** - clears the selections of a drop-down and table at run time
    - **Close** - closes the form
    - **Display rule** - e.g. hide or show controls based on a condition
    - **File upload** - uploads a file to a specified path
    - **Redirect** - redirects to another form
    - **Reset form variables** - resets the data of one or more form variables
    - **Same page** - redirects to the same page and allows target controls/fields/variables to be set
    - **Set focus** - sets the focus on a control in a form
    - **Set device** - allows end users to switch between desktop/phone/tablet versions of a form
    - **Update control** - reload and refresh results of work queue , job list, system queries

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Action Types

- Integration
  - **.Net method** - executes a .NET method
  - **Business rule** - invokes the business rule when the configured control is clicked
  - **DB query** - runs a database query (SQL Server)
  - **Web service** – call a SOAP, SOAP WCF, or Restful web service
  - **RPA** – call a robot
  - **JavaScript** – call JavaScript code

- Condition
  - **Begin and End condition** – specifies when the event should fire and fires the event only if the condition is satisfied (multiple events may be created between Begin and End Condition events)
  - **Else condition** – used in conjunction with Begin, actions within the Else Condition are executed if the Begin condition is not met

KOFAX

Action Types

- **Table**
  - Add row – adds a row to a table
  - Delete row – deletes a row from a table
  - Update row - updates rows in a table

- **Composite**
  - Create an action that will run multiple actions

- **Web capture**
  - Perform web capture actions on a web capture control e.g. Save, Import, Scan, Delete Page, Zoom In etc.

KOFAX

Themes, Header, and Navigation

- Create or apply a Theme
  - Can use out of box theme or create your own
  - Can plug in a CSS file
  - Theme is applied to the site

- Header form
  - WorkspaceHeader (out of box form that can be customised)
  - Can create your own header
  - Can turn header on/off for a specific form e.g. logon form

- Navigation
  - Can turn vertical/horizontal navigation on/off for a specific form

Themes

Header

Navigation
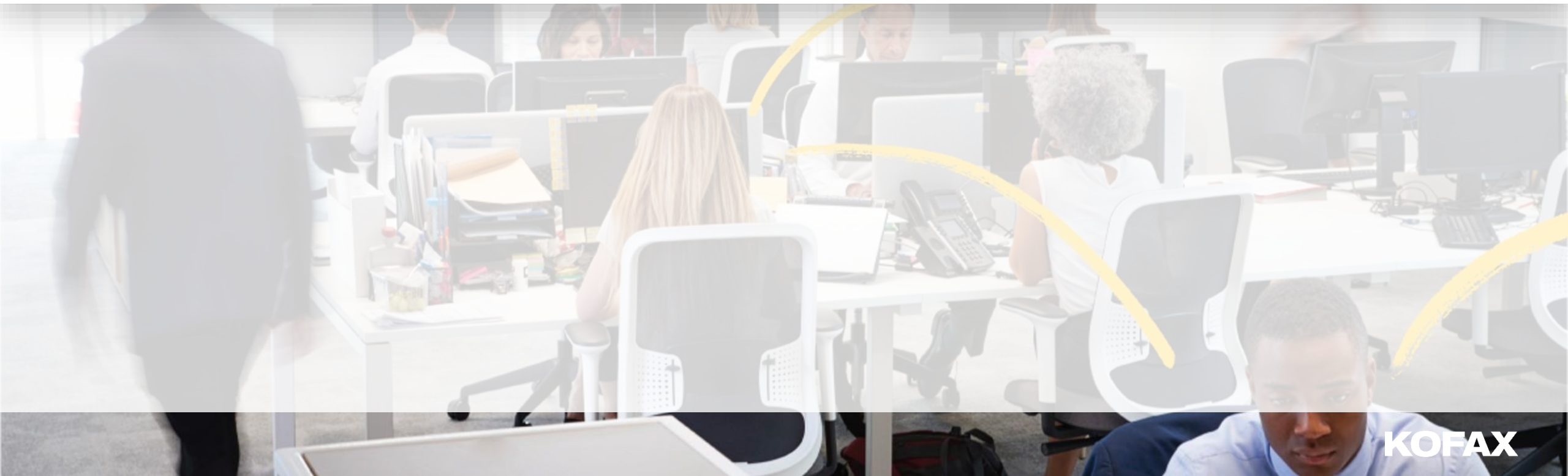
Training Scenario

Training Scenario

- Customise Loan Approval form:
  - Reposition fields
  - Add column and rows
  - Set control width (%)
  - Set mandatory field and error message
  - Add a dropdown list to Approve/Reject the loan (replace the checkbox)
  - Add a Web Capture control to view the application document
  - Edit form Actions
- Create and Apply Theme
- Apply/Remove a Menu from a form

KOFAX

Training Scenario

- Self Learning
    - Customize Logon Form
        - Add image, cell color etc.
    - Control Redirect Behaviour

     KOFAX

Completed Loan Approval Form

Self Learning – Customize Logon Form

Customize Login Form

- Customise Logon form
  - Columns, Rows, and Cells (layout a form)
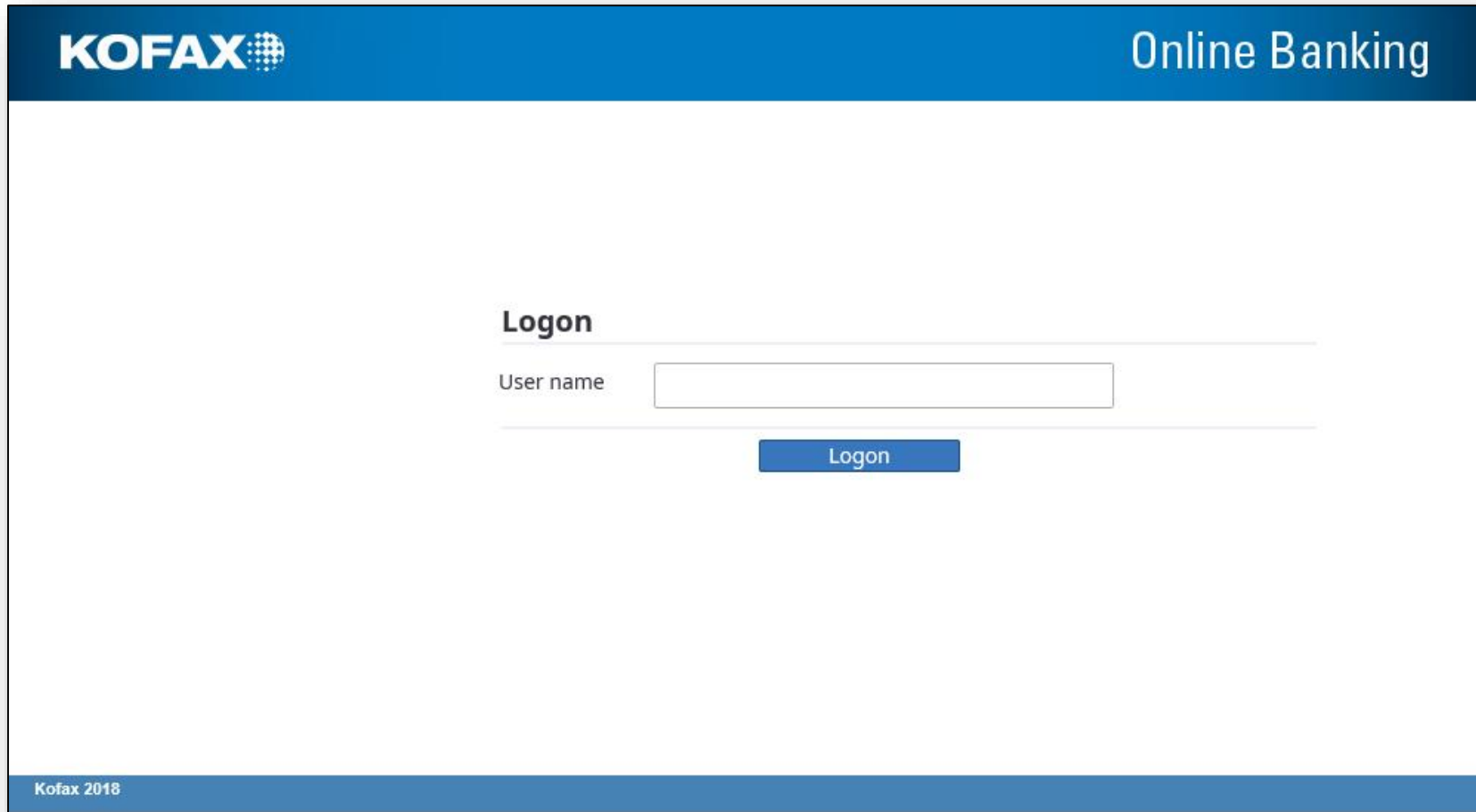 - Add Image
  - Margins
  - Form will shrink (collapse) if no controls are present in a row

- Create or apply a theme
  - CSS or Windows Preset

- Header form
  - WorkspaceHeader (out of box form that can be customised)

 KOFAX

Completed Logon Form

Site Navigation and Security

http(s)://server-name/TotalAgility/Forms/XYZBank

```
Logon  →  General Workqueue  →  Actvity
                            →  Create New Job
                            ↓
                          Job List
```
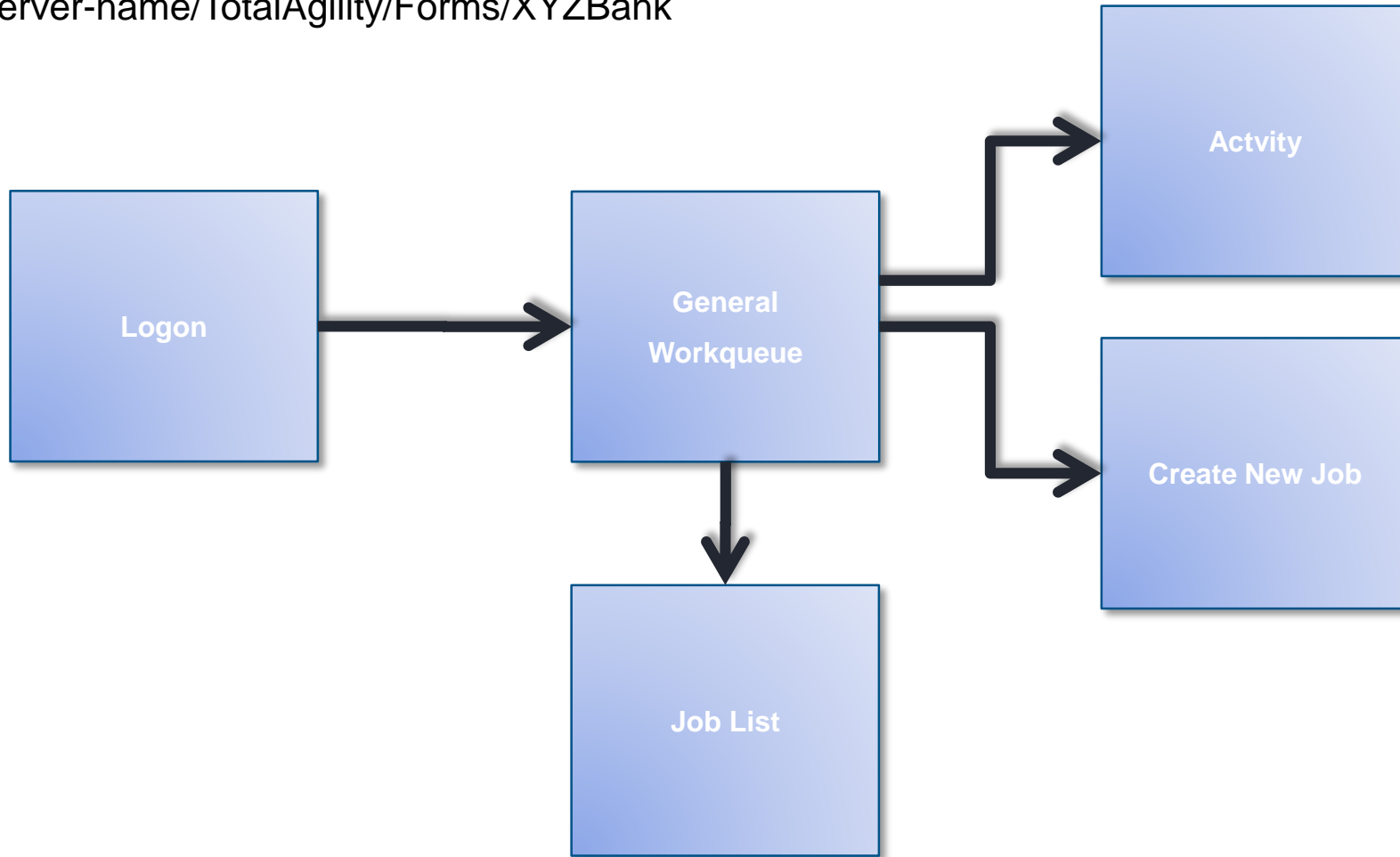
Default Workspace: http(s)://server-name/TotalAgility/Forms

KOFAX

Redirect Configuration

- You can configure a warning message to be displayed if a user attempts to navigate away from a form. This can be especially useful on Activity forms

- Examples include:
  - Any action that takes the user away from the current form (e.g. redirect action, menu)

  - Closing the browser tab/window
  - Typing into the integrated browser search bar
  - Typing a URL into the browser address bar
  - Using the browsers Back/Forward buttons

    KOFAX

Redirect Configuration

- **Ignore redirect confirmation** property can be set to Checked/Unchecked for:
  - Form
  - Redirect action