

TECHNICAL TRAINING LAB INSTRUCTIONS

In this lab you will learn how to create a Site and Forms. Forms can be built to initiate a scan job, confirm classification results (Document Review Form), and validate extraction values (Validation Form).

Lab 07-1

Create a New Site based on the TotalAgility Workspace

Create a New Site

In this part, you will create a new blank site (web) using the same header, navigation, and theme, as the Kofax TotalAgility Workspace.

1. From the **Main** menu navigate to **User interface > Sites**, and click **New**.
2. Enter **xyzbank** as the site name.
Note: Do not include space characters in the site name.
3. From the **Category** dropdown, select **XYZ Bank**.
4. From the **Theme** dropdown, select **TotalAgility Workspace** (TotalAgility Forms category).
5. From the **Header form** dropdown, select **WorkspaceHeader** form (TotalAgility Forms category).
6. From the **Horizontal navigation** dropdown, select **WorkspaceMenu** (Default Category).
Note: In practice we would recommend creating your own menu rather than customize the out of box workspace menu.

New site *

* indicates a required field

Name* xyzbank

Category* XYZ Bank x

Languages [Add](#)

Desktop settings

Theme* TotalAgility Workspace x

Header form WorkspaceHeader x

Horizontal navigation WorkspaceMenu x

Vertical navigation

Default form

7. Click **Save**.

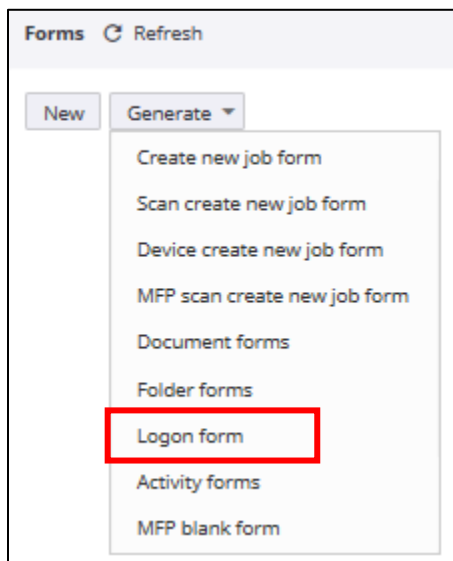
Lab 07-2

Build Forms

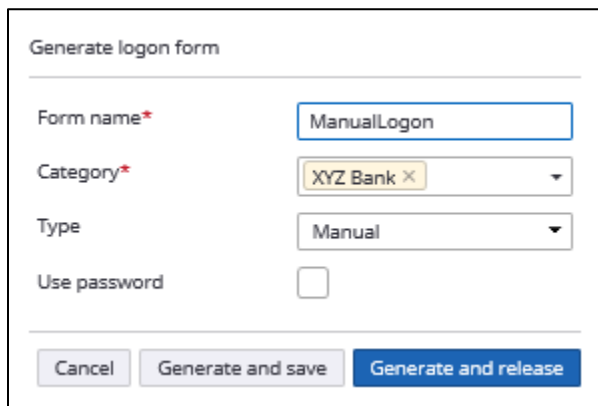
Create a Logon Form

In this part, you will create a Logon form. As the out of box Workspace uses Windows Authentication, we will build a manual Logon form that will allow us to log on as different users.

1. From the **Main** menu navigate to **User interface > Forms**.
2. From the **Generate** dropdown, select **Logon form**.



3. Set the following options:

A screenshot of the 'Generate logon form' dialog box. The dialog has a title bar that says 'Generate logon form'. Inside, there are four fields: 'Form name*' with the value 'ManualLogon', 'Category*' with a dropdown menu showing 'XYZ Bank', 'Type' with a dropdown menu showing 'Manual', and 'Use password' with an unchecked checkbox. At the bottom of the dialog, there are three buttons: 'Cancel', 'Generate and save', and 'Generate and release'.

4. Click **Generate and release**.

Notes: (i) The form becomes visible in the list page (Filter by XYZ Bank category).
(ii) Please read the notes area regarding using a logon form without a password.

TECHNICAL TRAINING LAB INSTRUCTIONS

Set Default Form for Site

In this part, you will make the ManualLogon form the Default form for the site i.e. when a user access the URL <http://localhost/TotalAgility/Forms/xyzbank/> they will be redirected to the Logon form (Default form) for the site.

5. From the **Main** menu navigate to **User interface > Sites**.
6. From the **Category** dropdown, select **XYZ Bank**, and click the **xyzbank** site.
7. From the **Default form** dropdown, select **ManualLogon** (XYZ Bank category).

Edit site *

* indicates a required field

Name*

Category*

Languages [Add](#)

Desktop settings

Theme*

Header form

Horizontal navigation

Vertical navigation

Default form

8. Click **Save**.

Create a Scan Create New Job Form

In this part, you will create a Scan create new job form. The form will be accessed from a website and allow users to scan images from a Scanner or File Source (Import).

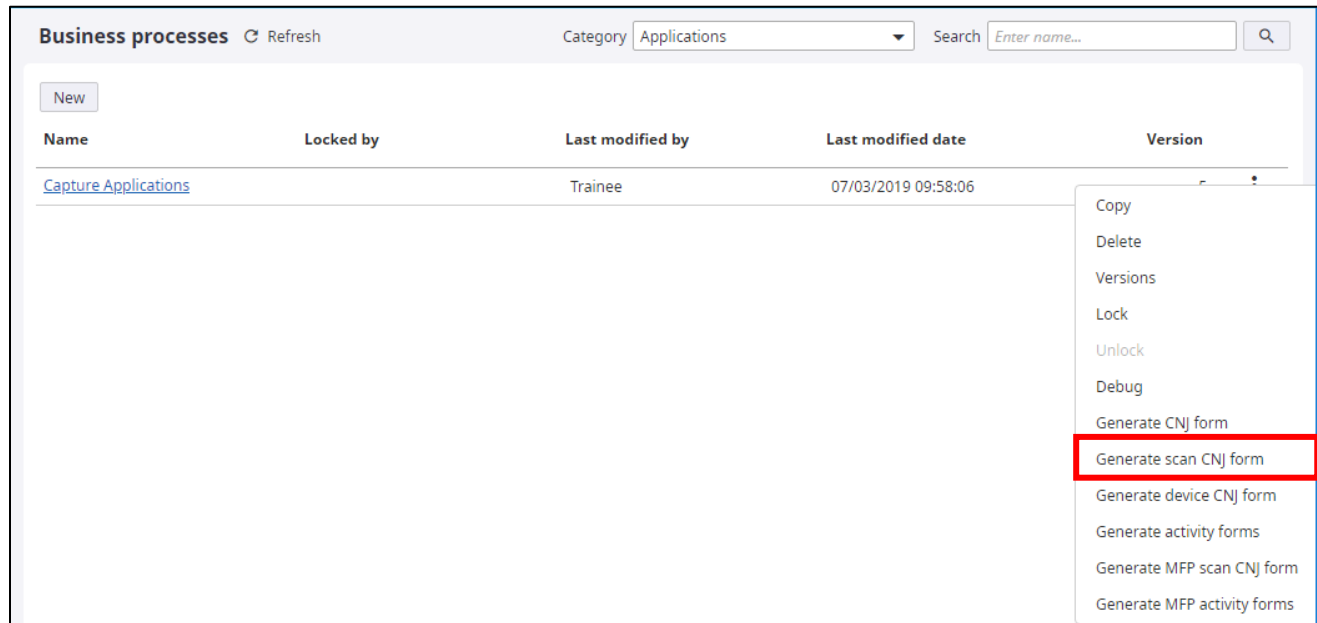
Please note there are 2 options of creating forms related to processes in TotalAgility. Complete one of these options based on your preference.

Option 1 (Business processes list page)

9. From the **Main** menu navigate to **Workflow > Business processes**.
10. Locate the process in the list page.

TECHNICAL TRAINING LAB INSTRUCTIONS

11. Click : and from the **Context** menu, select **Generate scan CNJ form**.

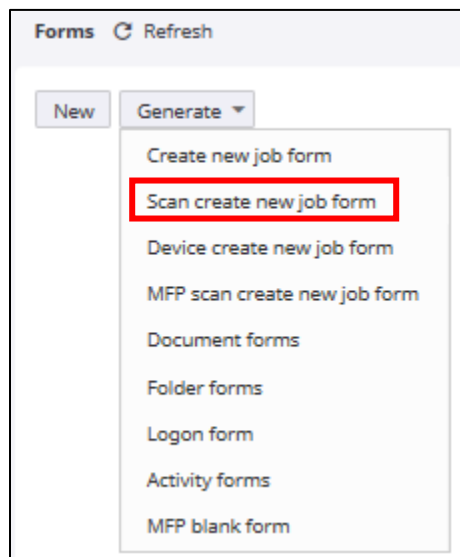


12. Click **Cancel**.

Option 2 (User interface list page)

13. From the **Main** menu navigate to **User interface > Forms**.

8. From the **Generate** dropdown, select **Scan create new job form**.



9. From the **Process** dropdown, select **Capture Applications**.

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Scan create new job form

Process* Capture Applications (Process) x

Form name* CaptureApplications_Scan

Category* Applications x

☒ Update process with associated form

Cancel Generate and save Generate and release

10. Remove the space character in the form name, and leave the other options as default.

11. Click **Generate and release** (remain on the list page for the next part).

Notes: (i) The form becomes visible in the list page. The form has been named CaptureApplications_Scan (Process Name_Form Type).

(ii) The **Capture Applications** process **Job creation form** property in the **Access** tab has been updated with the name of the newly built scan create new job form

Create Activity Forms

In this part, you will create forms for all the manual activities in the Capture Applications process i.e. Document Review, and Validation. An activity form is displayed when a user takes an activity from their work queue. The form is linked to the activity using the Associated file property of the activity.

12. From the **Generate** dropdown, select **Activity forms**.

13. From the **Process** dropdown, select **Capture Applications**.

TECHNICAL TRAINING LAB INSTRUCTIONS

Generate activity forms

Process*
Capture Applications (Process) x

Options
☒ Include embedded processes
☒ Update processes with associated forms
☐ Include save button
☐ Include complete and next button

| | Form name | Category | Activity name | Process name | Activity type |
|-------------------------------------|---------------------------------|--------------|-----------------|----------------------|-----------------|
| <input checked="" type="checkbox"/> | CaptureApplications_Document... | Applications | Document Review | Capture Applications | Document review |
| <input checked="" type="checkbox"/> | CaptureApplications_Validation | Applications | Validation | Capture Applications | Validation |

Cancel
Generate and save
Generate and release

14. Select the first form in the list and click **Edit** (the pencil). Modify the form name to: **CaptureApplications_Document Review** and click **OK**.

15. Select the second form in the list and click **Edit** (the pencil). Modify the form name to: **CaptureApplications_Validation** and click **OK**.

16. Leave the other options at their defaults.

Note: Any manual activities are automatically detected in the selected process (and any associated processes). The **Update processes with associated forms** property is selected. This property links the activity in the process to its corresponding form.

17. Click **Generate and release**.

Note: The forms become visible in the Forms list page.

| Name |
|--|
| CaptureApplications_DocumentReview |
| CaptureApplications_Scan |
| CaptureApplications_Validation |

Lab 07-3

TotalAgility Workspace

Accessing the TotalAgility Workspace

In this lab you will learn how to access the out of box Kofax TotalAgility Workspace.

1. In the browser, open a new tab and navigate to: <https://kta-train/TotalAgility/Forms>
Note: Create a shortcut called Workspace in the Bookmarks bar in Google Chrome on your training environment if you have not already done so.
2. You are redirected to the **GeneralWorkqueue** form.

The screenshot shows the 'TotalAgility Workspace' application. At the top, there is a navigation bar with 'To Do', 'Jobs', 'Resources', and 'Administration' menus. Below this is a 'Work Queue' section. On the left, a sidebar lists 'My Queries' and 'Shared Queries'. Under 'Shared Queries', 'All Activities (default)' is selected. The main area displays a table with columns: 'Activity Name', 'Process', 'Priority', and 'Due Date'. The table is currently empty. Above the table, there are 'Refresh' and 'Edit Query' buttons.

3. We will return to the TotalAgility workspace later, but for now there is no way of accessing our newly created Scan Application form.

Lab 07-4

Configure Navigation

Add a Menu Item to the Site Navigation Menu

In this part of the lab you will modify the WorkspaceMenu menu by creating a new menu item that will redirect to the Capture Applications_Scan form.

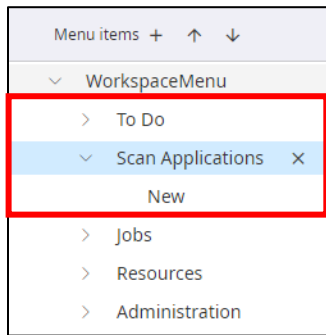
Note: You can either edit the menus provided in the Workspace or create your own menus.

1. From the **Main** menu navigate to **User interface > Navigations**.
2. From the **Category** dropdown, select **Default Category**.
3. Click **WorkspaceMenu**.
4. Click **Add (+ Sign)** and select **MainMenu1**.
5. Enter **Scan Applications** as the **menu item name**.
6. Click **Add** to create a submenu item.
7. Configure the new submenu with the following menu options:
Menu item name: **New**
Redirect:
 Type: Form
 Target: **CaptureApplications_Scan**
Window: **Same window**

The screenshot shows the 'Navigation menu - new' configuration interface. The 'Menu item name' field is set to 'New'. Under the 'Redirect' section, the 'Type' is set to 'Form' and the 'Target' is set to 'CaptureApplications_Scan x'. The 'Target' field is highlighted with a red rectangle. The 'Window' is set to 'Same window' and the 'Load' option is set to 'Entire page'.

8. Use the up/down arrows to **Move** the **Scan Applications** menu so that it appears **after** the **To Do** menu.

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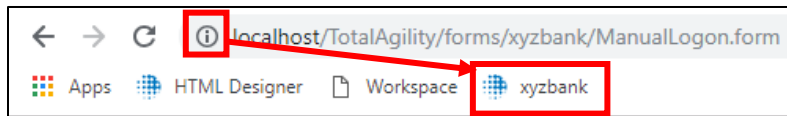


9. Click **Save**.

Accessing the New Site

10. In the browser, open a new tab and navigate to: <https://kta-train/TotalAgility/Forms/xyzbank>

11. Add this address as a bookmark to the **Bookmarks** bar in **Chrome** (drag and drop), and rename as **xyzbank**.



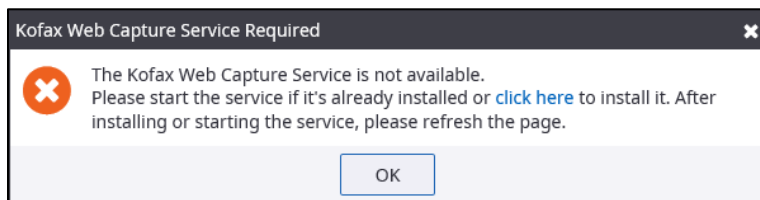
12. Login as **pblack** (Validation Operators resource group). You are redirected to the **GeneralWorkQueue** form.

Note: Username is not case sensitive.

A screenshot of a 'Logon' form. It has a title 'Logon' at the top. Below the title is a text input field labeled 'User name' containing the text 'pblack'. To the right of the input field is a small 'x' icon. Below the input field is a blue button labeled 'Logon'.

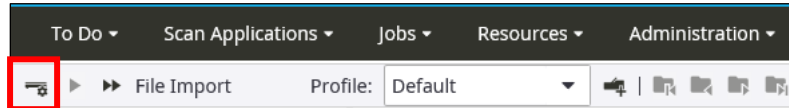
13. From the **Scan Applications** menu click **New**. The **CaptureApplications_Scan** page is displayed.

Note: On a new installation you will receive a message to install a Web Capture service. Click the [click here](#) link and **Run** the msi file (bottom left corner of Chrome). *Refresh* the form.



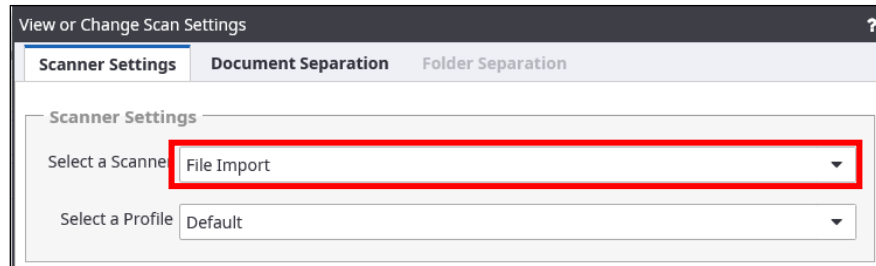
14. Click the **Scan Settings** icon.

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Note: If the Scan Settings icon is not enabled it means the Web Capture service has not been installed.

15. Select **File Import** from the **Select a Scanner** dropdown.



Note: We will import pre-scanned documents. In practice a list of available scanners would be available in the **Select a Scanner** dropdown.

16. The **Scan Settings** come from the **Separation** and **Default Scan/VRS** Profiles that were applied to the Capture Applications process.

17. The screenshots below are for information purposes only, you do not have to change any settings. After viewing the screenshots please continue on point 19.

TECHNICAL TRAINING LAB INSTRUCTIONS

File Import Settings

The screenshot shows the 'View or Change Scan Settings' dialog box with three tabs: 'Scanner Settings', 'Document Separation', and 'Folder Separation'. The 'Scanner Settings' tab is active. It contains two main sections: 'Scanner Settings' and 'Profile Settings'.

Scanner Settings:

- 'Select a Scanner' is set to 'File Import'. A red box highlights this text, and a red arrow points from a text box to it.
- 'Select a Profile' is set to 'Default'. A red arrow points from a text box to this dropdown.

Profile Settings:

- Color:** A group of radio buttons with 'Black and White' selected.
 - ☐ Black and White (Image Enhancement required)
 - ☒ Black and White
 - ☐ Gray
 - ☐ Color
 - ☐ Automatic (Image Enhancement required)
- Image Enhancement Settings:** A checkbox that is currently unchecked.

Buttons: 'Reset', 'OK', and 'Cancel' are located at the bottom of the dialog.

Annotations:

- A text box on the right contains the text: "For training purposes you will import from File rather than a scanner." A red arrow points from this box to the 'File Import' selection.
- A text box labeled 'Scan/VRS Profile' has a red arrow pointing to the 'Default' profile dropdown.

TECHNICAL TRAINING LAB INSTRUCTIONS

Example of Scanner Settings

View or Change Scan Settings
?

Scanner Settings
Document Separation
Folder Separation

Scanner Settings

Select a Scanner
FUJITSU fi-5120Cdj #2

☐ Scan from Device Vendor Dialog

Select a Profile
Default

Profile Settings

Color

- ☐ Black and White (Image Enhancement required)
- ☒ Black and White
- ☐ Gray
- ☐ Color
- ☐ Automatic (Image Enhancement required)

Paper

Resolution
200 DPI

Size
A4 (210mm x 297mm)

Orientation

- ☒ Portrait
- ☐ Landscape

Paper Source

- ☒ ADF
- ☐ Flatbed

Duplex

- ☒ Simplex
- ☐ Duplex
- ☐ Automatic

☐ Image Enhancement Settings

Reset
OK
Cancel

TECHNICAL TRAINING LAB INSTRUCTIONS

View or Change Scan Settings

Scanner Settings **Document Separation** Folder Separation

☐ Bar Code and Patch Code Separation

☒ Bar Code Separation

Bar Code Type Code 39 x

☐ Bar Code Checksum

Start New Document When:

☒ Bar Code Type Found

☐ Bar Code Value Changes

☐ Bar Code Value Found

Value Search Text

☐ Value search text uses regular expression

☐ Use Bar Code Value For Document Type

☐ Patch Code Separation

Patch Code Type

☐ Delete Patch Code Separator Sheet

☒ Fixed Sheet Separation

Sheets Per Document 1

☐ Manual Separation

Reset OK Cancel

Fixed Sheet Separation (Document link). A document has 1 fixed sheet.

Note: In the Essentials class the Folder Separation tab will be disabled. We are not using Folder Separation.

Separation profile Separate Applications x

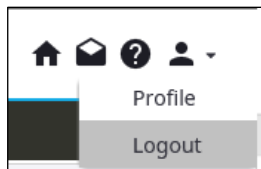
Scan/VRS profiles Add ↓ ↑

Default x

18. The **Capture Applications** process is configured at the process level with the Separation Profile **Separate Applications**, separating each application into 1 fixed sheet per document.

19. Click **OK**.

20. Click the **Logout** option at the top right corner of the workspace. **Close** the browser tab.

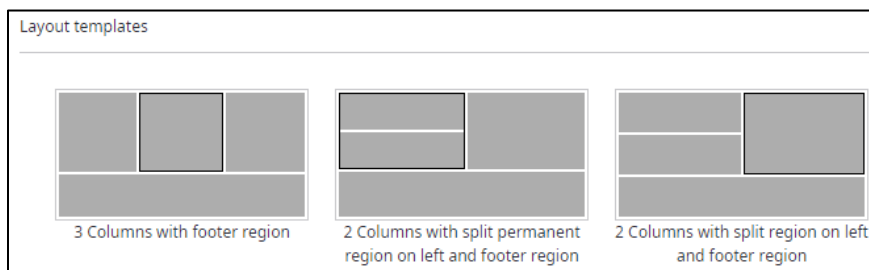


At this point we need to think about the sample documents we will be scanning. We will need to provide samples and train Kofax TotalAgility to classify documents, extract data from documents, and pass this data and/or folder/document into a downstream process. This is achieved using the Transformation Designer which is covered in the next Lab.

Lab Notes

Capture Control Layouts

1. You can change the layout of Scan create new job, document review, scan, validation, and verification forms.
2. From the **Main** menu navigate to **Capture > Control layouts**, and click **New**.
3. Enter a layout name, and from the **Control type** dropdown select the **Control type** e.g. Scan create new job.
4. Click **Configure** and select one of the layout templates.



5. Click **Save**.
6. Open the **Scan create new job** form you have previously built and select the capture control.
7. From the **Properties** panel, from the **Layout** dropdown, select the relevant layout.

General Work Queue Form

8. The design time GeneralWorkqueue form can be found in the Forms list page and the TotalAgility Forms category. This form can be modified e.g. to set a column to sort on or the sort order.

Switching to Desktop/Phone/Tablets Forms

9. There is a form action called Set Device that allows end users to switch between desktop/phone/tablet versions of a form. We will not cover the Set Device action in this class.

Logon without Password

10. In order to use a manual logon form without a password, you must uncheck the Disable logon without password property. From the **Main** menu navigate to **System > System settings**, and from the **Logon and authentication** card, click **Passwords and logon**. Uncheck the **Disable logon with password** checkbox and click Save. You must restart the App pool and services, and refresh the logon form.

Revision Questions

1. What is the purpose of a site?

2. Can you use the same form in multiple sites?

3. A site must have a name and theme at the minimum?

4. You need to build forms for your capture applications process. What form types would you need to build?

5. A designer creates a new form and clicks save. Will the form be accessible to the end users if they attempt to access the form in their browser?

6. Can you rename forms that are associated with a process? I.e. Scan CNJ forms or Activity forms?

7. What activity property links an activity to its associated take activity form?

8. What process property links a process to its associated scan create new job form?

9. Can you customize the out of box navigation menus?

10. Where are forms stored?

11. What is the TotalAgility Workspace?

