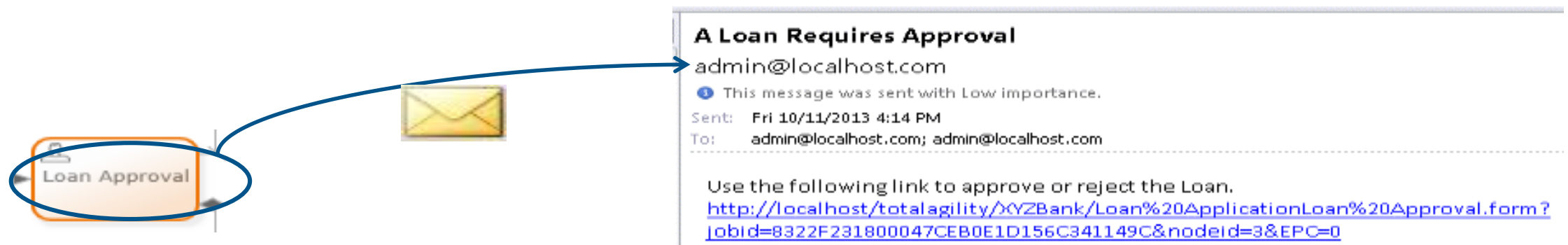# Notifications and Document Creation

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)
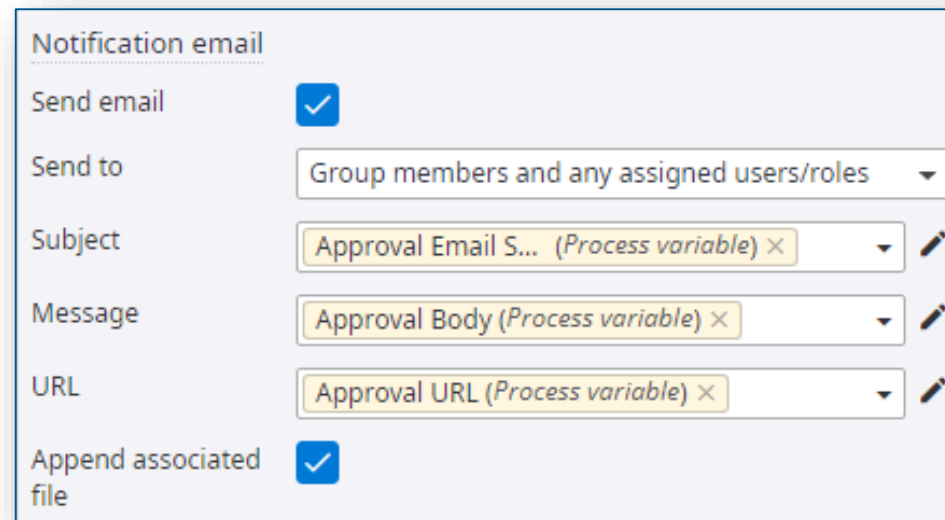
KOFAX

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

A Loan Requires Approval
admin@localhost.com
ⓘ This message was sent with Low importance.
Sent: Fri 10/11/2013 4:14 PM
To: admin@localhost.com; admin@localhost.com

Use the following link to approve or reject the Loan.
http://localhost/totalagility/XYZBank/Loan%20ApplicationLoan%20Approval.form?jobid=8322F231800047CEB0E1D156C341149C&nodeid=3&EPC=0

Loan Approval

KOFAX

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**
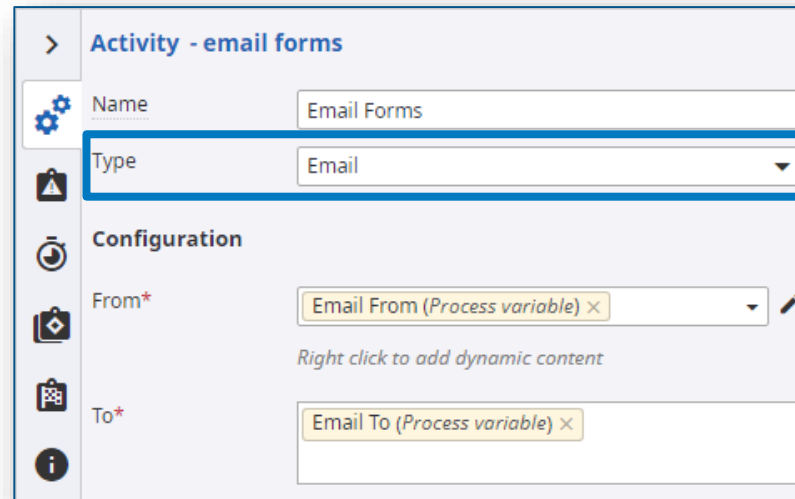

Ensure that the resource is configured with an *email address* (via the Resources module)

KOFAX

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

KOFAX

Adding an Email Activity

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

Activity and Email Notifications

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

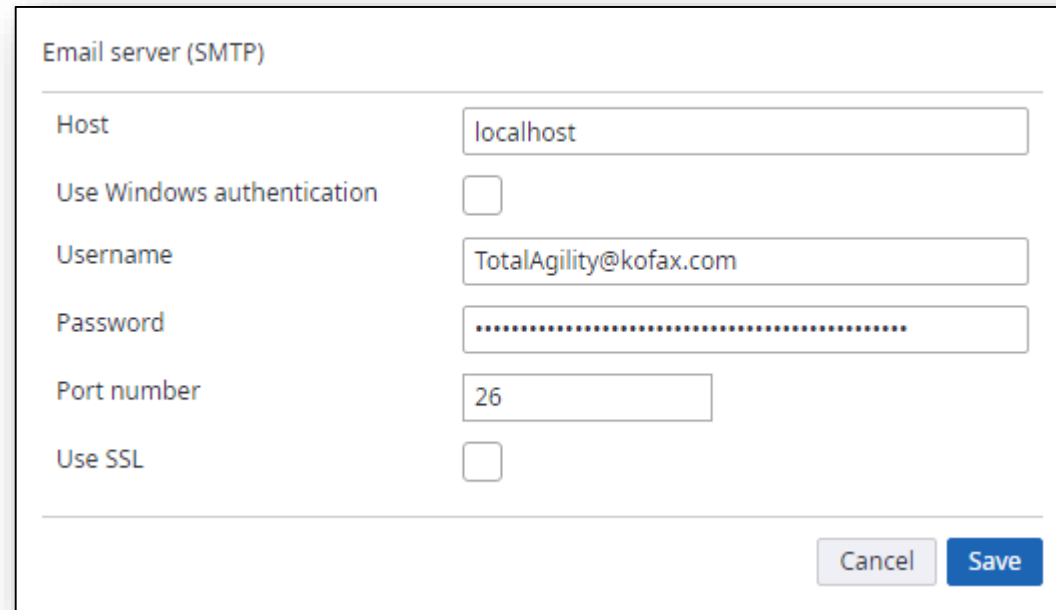You can send emails to *multiple* participants

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:

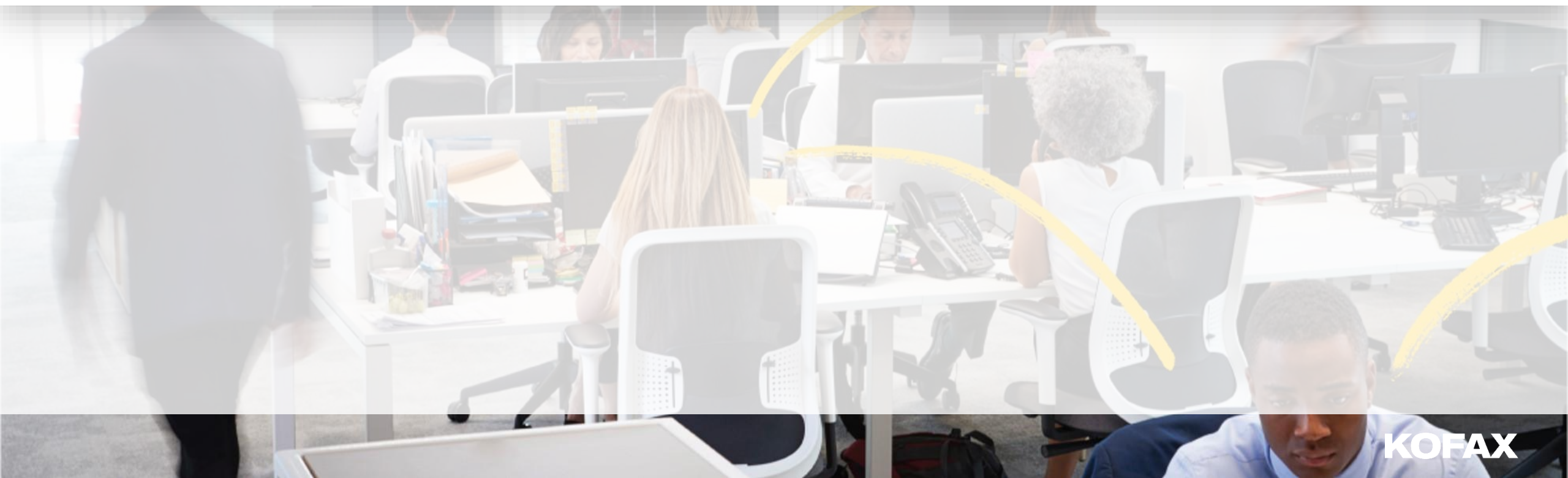| Server Variables	Default Values
SYSTEM_EMAIL_FROM	TotalAgility@kofax.com

KOFAX

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

Document Creation

KOFAX

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)

 KOFAX

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
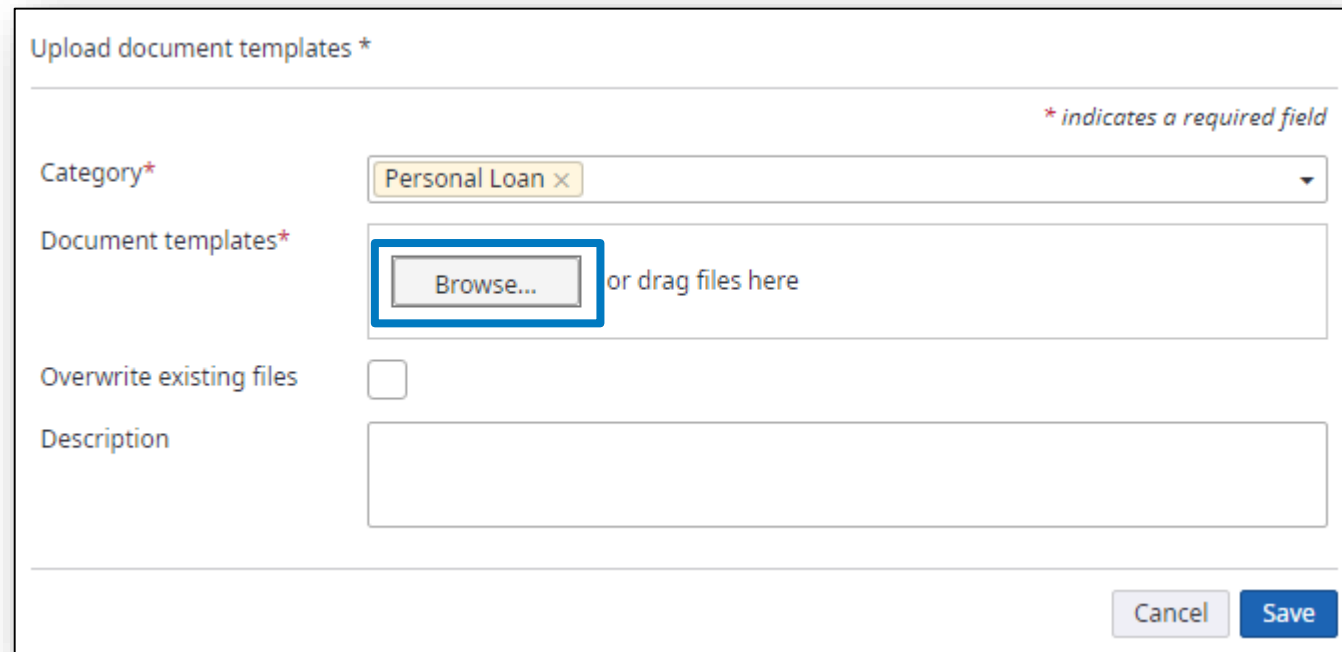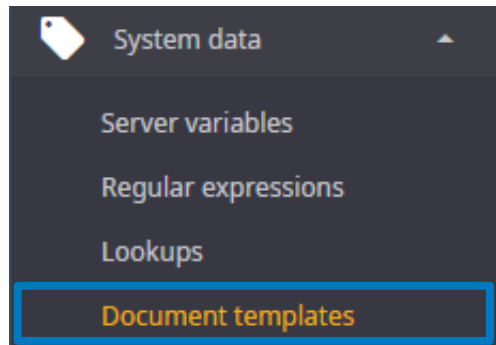
KOFAX

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

KOFAX

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**

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)

KOFAX

Adding a Document Creation Activity