

TECHNICAL TRAINING LAB INSTRUCTIONS

In this lab you will learn how to manually create an individual, a group, a supervisor, and assign resources to activities. In this example you will create a Validation Operators group, who will be responsible for reviewing classification results, and validating extracted data from documents.

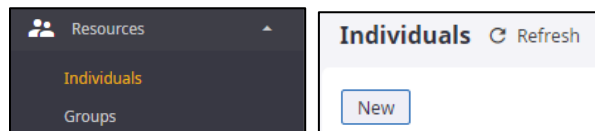
Lab 04-1

Resources and Basic Workflow Rules

Create Resources

In this part, you will create a new Individual Resource.

1. From the **Main** menu navigate to **Resources > Individuals**, and click **New**.



2. On the **General** tab, add the following **New Individual** details:

New individual *

General * indicates a required field

Account	Full name*	Paul Black
	Username*	pblack
Organization	Password	
	Confirm password	
Membership	Email address	pblack@kofax.com
	Phone number	
Advanced	Category*	XYZ Bank ×
	Working category	Default Category ×

3. Select the **Organization** tab, and set **Managerial level** to **Level 1**.

New individual *

General	Supervisor	
Account	Managerial level	Level 1
Organization	Direct reports	
Membership		
Advanced		

4. Click **Save**.
5. To view the new resource select **XYZ Bank** from the **Category** dropdown.

TECHNICAL TRAINING LAB INSTRUCTIONS

Create a Resource Group

In this part, you will create a Resource group.

6. From the **Main** menu navigate to **Resources > Groups**, and click **New group**.
7. Add the Following **Group**:

New group resource *

General * indicates a required field

Name* Validation Operators

Category* XYZ Bank x

Email address

Supervisor

Group members Add

8. From the **Category** dropdown, select **XYZ Bank** (This category was imported in the previous lab).
9. For **Group members**, click **Add**.
10. Click the *Showing Default Category* hyperlink and select **XYZ Bank**.

Add group members

Individual Filter

Showing Default Category

11. Select **Paul Black**.

Note: You can see a list of individuals who are a member of this group in the Selected items area.

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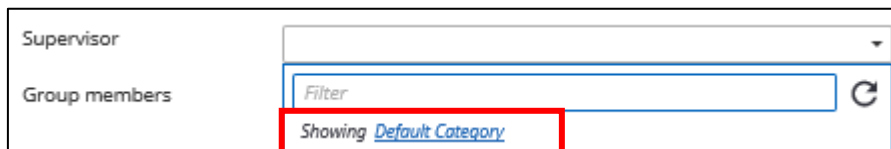


12. Click **Done** (leave the screen open for the next part).

Assign a Supervisor to a Resource Group

In this part, you will make Paul Black a supervisor of the Validation Operators group.

13. With the **Validation Operators** group still open, from the **Supervisor** drop down, click the *Showing: Default Category* hyperlink and select **XYZ Bank**.



14. Select **Paul Black**.

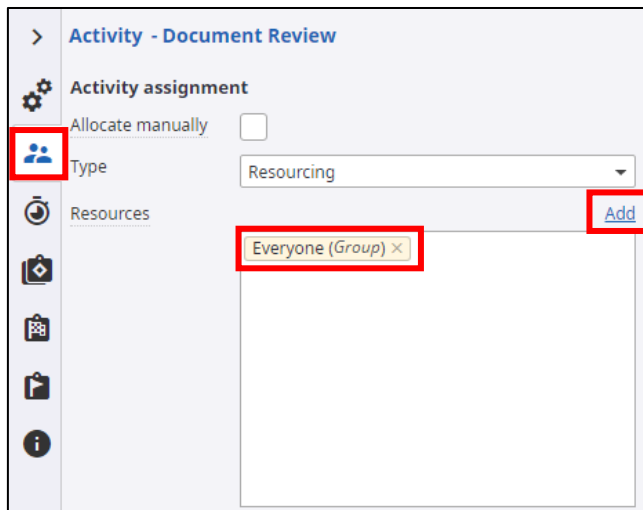
15. Click **Save**.

Assign Resources to an Activity Using Basic Workflow Rules

In this part, you will assign the Validation Operators resource group to the Document Review and Validation activities.

16. Select the **Capture Applications** browser tab, and select the **Document Review** activity.

17. From the **Properties** panel, select the **Resource assignment** tab.



18. **Delete** the **Everyone (Group)** by clicking the **x** to the right of the group name.

TECHNICAL TRAINING LAB INSTRUCTIONS

19. Click **Add**.

20. With the **Group** tab selected, click the *Showing Default Category* hyperlink and change the Category to **XYZ Bank**.

21. Select **Validation Operators**.

Add resources

Group Filter Add all

Showing XYZ Bank

Admin

Approving Officers

Finance

Senior Approving Officers

Validation Operators

Selected items Remove all

Validation Operators (Group) ×

22. Click **Done**.

Note: By default, basic workflow rules are in force i.e. everyone in the group will see the activity, and the first person to take the activity will remove the activity from everyone else's work queue.

23. Repeat steps 16-21 for the **Validation** activity.

Note: In practice the Document Review and Validation activities may be completed by different groups, but for training purposes, we will use the same group to carry out both capture based activities.

24. **Save** and **Close and unlock** the process.

Lab 04-2

Assign Capture Runtime Operations

Assign Capture Runtime Operations to the Validation Operators Group

In this part, you will grant capture runtime operations to the Validation Operators group. By default only the Designers group can perform all of the capture functionality e.g. reject documents, delete pages, change document type, add/delete folders, mark for online learning etc. To enable these options when a Validation Operator opens e.g. a document review or validation form, we must grant this group the appropriate permissions.

Note: The capture functionality will appear enabled on the capture toolbar on the each of the capture based forms.

1. From the **Main** menu navigate to **System > System settings**, and from the **User behavior** card, click **Capture operations**.
2. Click the **+** icon.
3. From the **Resource** dropdown, select the **Group** tab, and filter by the **XYZ Bank** category.
4. Select the **Validation Operators** group.
5. Check all the checkboxes, and click **Save**.

Add user permissions *

* indicates a required field

Resource* Validation Operators (Group) X

Documents	Pages	Folders
Reject documents <input checked="" type="checkbox"/>	Reject pages <input type="checkbox"/>	Add folder <input checked="" type="checkbox"/>
Delete documents <input checked="" type="checkbox"/>	Delete pages <input type="checkbox"/>	Delete folders <input checked="" type="checkbox"/>
Change document type <input checked="" type="checkbox"/>	Rotate pages <input checked="" type="checkbox"/>	
Split documents <input checked="" type="checkbox"/>		
Split on back page <input checked="" type="checkbox"/>		
Merge documents <input checked="" type="checkbox"/>		
<div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p>Other</p> <p>Annotations <input checked="" type="checkbox"/></p> <p>Online learning <input checked="" type="checkbox"/></p> <p>Override problems <input checked="" type="checkbox"/></p> <p>All other batch editing operations <input checked="" type="checkbox"/></p> <p>Web capture mask and redact <input checked="" type="checkbox"/></p> </div> <div style="width: 45%;"> <p>SDK only</p> <p>Create documents and pages <input checked="" type="checkbox"/></p> <p>Modify/Read document <input checked="" type="checkbox"/></p> <p>Confirm fields <input checked="" type="checkbox"/></p> <p>Mask and redact images <input checked="" type="checkbox"/></p> </div> </div>		

Cancel
Save

TECHNICAL TRAINING LAB INSTRUCTIONS

6. The **Capture operations** permissions should look like this:

Capture operations *								
+ ✎ 🗑								
Resource	Reject documents	Delete documents	Change document type	Split documents	Split on back page	Merge documents	Reject pages	Delete pages
Device Users	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Designers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Validation Operators	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

7. Click **Save**.

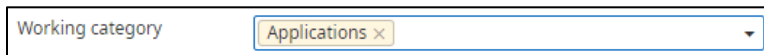
Lab 04-3

Set a Resources Working Category

Set Working Category

In this part, you will set the Trainee resource's working category. During installation the Trainee account was automatically added to the Administrators, Designers, and Device Users groups. By setting the Trainee's working category to Applications, this ensures that when new items are created, they will automatically be added to this category. When browsing for existing items the category will default to the Applications category.

1. From the **Main** menu navigate to **Resources > Individuals**.
2. Click the **Trainee** resource.
3. From the **Working category** dropdown, select **Applications**.

A screenshot of a web form element. It consists of a rectangular box with a light gray border. Inside the box, on the left, is the text 'Working category' in a small, dark font. To the right of this text is a dropdown menu. The dropdown menu has a light yellow background and displays the word 'Applications' in a dark font. To the right of 'Applications' is a small 'x' icon, and further right is a small downward-pointing arrow icon.

4. Click **Save**.
5. Test the **Working Category** by navigating to **Workflow > Business processes**. The **Applications** category will be the default category.

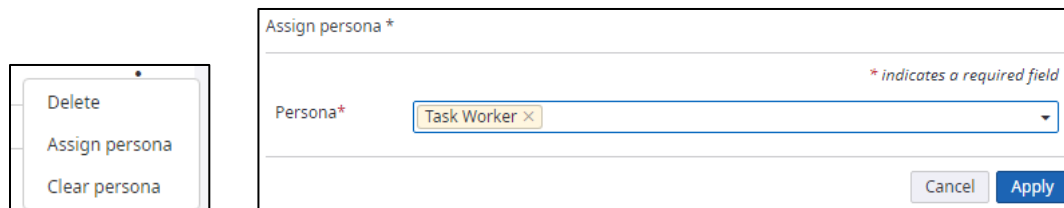
Lab 04-4 – Self Learning (Do not complete in class)

Assign a Persona to a Group

Assign a Persona to a Group

In this part, you will assign a Persona to the Validation Operators resource group. A Persona allows you to specify the landing page the worker or group will be redirected to when they log in. In this example the Validation Operators group will be redirected to the Task Worker landing page. You can either update all members of a group with a persona or an individual resources persona.

1. From the **Main** menu navigate to **Resources > Groups**.
2. From the **Category** dropdown, select the **XYZ Bank** Category.
3. Locate the **Validation Operators** group in the list page.
4. Click the : (vertical ellipsis) and from the **Context** menu click **Assign persona**.



The screenshot shows a user interface for assigning a persona to a group. On the left, a context menu is open, displaying three options: 'Delete', 'Assign persona', and 'Clear persona'. The 'Assign persona' option is highlighted. To the right, a larger dialog box titled 'Assign persona *' is visible. It features a 'Persona*' dropdown menu with 'Task Worker' selected. A red asterisk next to the title and the dropdown label indicates that these fields are required. At the bottom right of the dialog box, there are two buttons: 'Cancel' and 'Apply'.

5. From the **Persona** dropdown, select **Task Worker** (Default Category), and click **Apply**.

Lab Notes

Active Directory Synchronization

1. You can synchronize the resources in Active Directory with TotalAgility.
2. You can learn more about Active Directory Synchronization in the SPA class and by searching for Active Directory in the online help.

Revision Questions

1. Basic workflow rules means that when a group is assigned to an activity, only those members of the group will see the activity, and that every member of the group must complete the activity?

2. The highest level a supervisor can have is 10?

3. Where possible you should try to assign groups to activities rather than individuals?

4. A group can have more than one supervisor?

5. Can a resource be deleted from the system if it is assigned to an activity in a design time process?

6. A user is removed from a group that is assigned to activities relating to insurance claims. The user logs in. Will the user see the activities relating to insurance claims?

7. What does setting a resources working category do?

8. By default all groups have capture access permissions to change a documents type at runtime?

9. What is a persona?

10. You must set a password when creating a resource?
