

TECHNICAL TRAINING LAB INSTRUCTIONS

In this lab you will learn how to configure the process to be initialized from a scan, create a variable to hold the folder of scanned applications, and configure the individual capture activities.

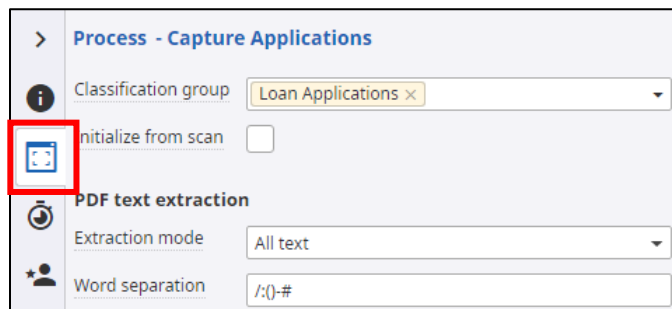
Lab 06-1

Change Process Capture Properties

Set Process Capture Properties

In this part, you will enable the process so that it can be initialised (created) from a Manual Scan form. You will also set the process to use the Classification Group and Separation Profile you created in earlier labs.

1. From the **Main** menu navigate to **Workflow > Business processes**, and open the **Capture Applications** process.
2. From the **Properties** panel, select the **Capture** tab.



3. From the **Classification group** dropdown, select **Loan Applications**.
Note: This is a user convenience; it does not mean that classification will take place on initialization of the process.
4. Check the **Initialize from scan** checkbox.
Note: This means we can build a Scan or Device create new Job form (webpage) form for this process, so that when you capture documents, TotalAgility automatically initiates this process. We will build forms in a later lab. Also note that Initialize from scan does not just mean scanning. It could be any multi-channel capture source.
5. From the **Separation profile** dropdown, select **Separate Applications**.
Notes: (i) the Default Scan/VRS Profile is used.
(ii) By setting the Separation Profile for the process, the separation will take place on Scan. You can also choose to separate *within* the process using the Classification activity i.e. after the process has been initiated.

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TECHNICAL TRAINING LAB INSTRUCTIONS

Process - Capture Applications

Classification group: Loan Applications x

Initialize from scan: ☒

Separation profile: Separate Applications x

Scan/VRS profiles: Add ↓ ↑

Default x

6. Click **Save**, and click **OK**.

Note: You are informed that you must create a variable of type folder or document.

In this lab you will learn how to create a folder variable.

Lab 06-2

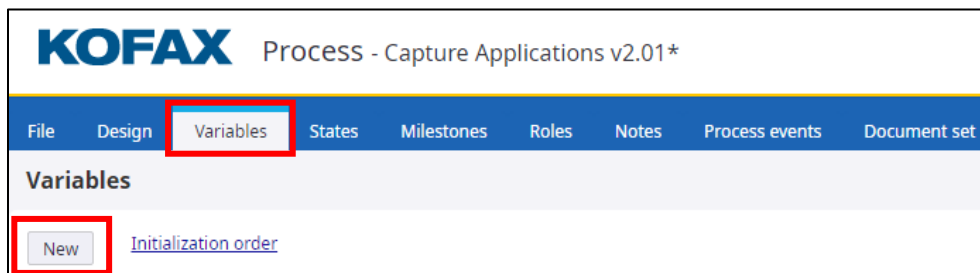
Variables

Create Process variables

In this part, you will create a folder initialization variable. When a variable is assigned as an **Initialization** variable its value is provided at the beginning of the process.

Two special capture variables exist, Document and Folder, and are used when a process is initialized from a scan or device. In this example we will initialize the Capture Applications process with a reference to the folder containing the applications. The folder variable *Value* will be set to the folder type we created in the previous lab i.e. we expect a folder of this type to be passed into the process. Document variables are used when we loop through a folder and extract each document or can be used to pass a reference to a document between processes.

1. From the **Ribbon**, select the **Variables** tab, and click **New**.



2. Create a variable called **Applications Folder** of Type **Folder** and configure as shown below:

The screenshot shows the 'New variable' dialog box. It contains the following fields and values:

- Name*: Applications Folder
- ID*: APPLICATIONS_FOLDER
- Type: Folder (selected from a dropdown)
- Initialization: ☒
- Value: Applications (selected from a dropdown)

At the bottom right, there are 'Cancel' and 'OK' buttons. A note at the top right states '* indicates a required field'.

Note: Use an underscore character to separate words in the variable ID field.

3. Check the **Process initialization** checkbox.

TECHNICAL TRAINING LAB INSTRUCTIONS

4. From the **Value** dropdown, select **Applications**.

5. Click **Add** to add the variable.

Note: Setting **Applications Folder** as an **Initialization** variable means that the process expects to be initialised with this data.

6. The variable list should look like this:

Name	ID	Type	Value	Initialization
Applications Folder	APPLICATIONS_FOLDER	Folder	Applications	✓

7. From the **Ribbon**, select the **Design** tab.

Note: When you create a process variable, you cannot modify its ID or Type. You must delete the process variable and re-create it. Use the ellipse icon to delete a variable.

8. **Save** the process.

In this lab you will learn how to configure the individual capture activities.

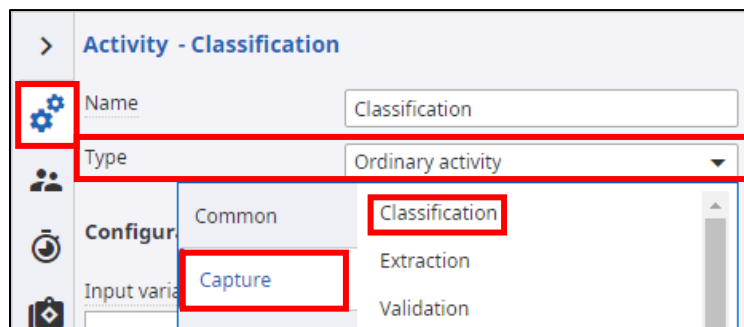
Lab 06-3

Configure Capture Activities

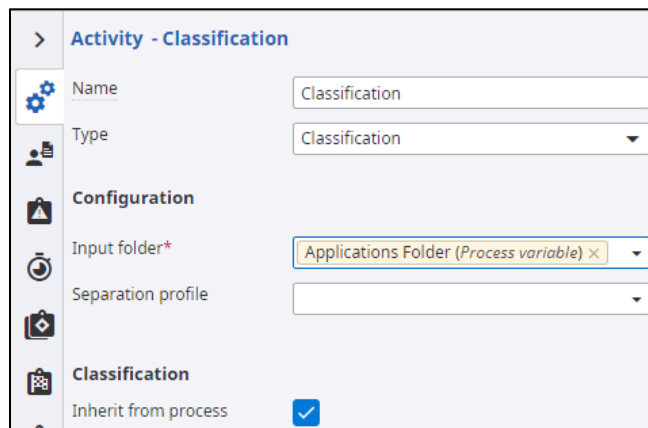
Set Activity Type

In this part, you will set each activity to its corresponding capture activity type. You will use the classification group, and input folder for the relevant activities.

1. Select the **Classification** activity.
2. From the **Properties** panel, from the **Type** dropdown, select **Classification** (Capture group).



3. From the **Input folder** dropdown, select **Applications Folder**.



Note: You can set a Separation Profile at the process level or in the Classification activity. In this example we are configuring separation at the process level, so that you can visualise the separation when the documents are scanned.

4. Note that **Inherit from Process** is checked by default.
Note: The classification group was applied as part of the process properties.
5. Select the **Document Review** activity.
6. From the **Type** dropdown, select **Document review** (Capture group).

TECHNICAL TRAINING LAB INSTRUCTIONS

7. Configure as shown:

The screenshot shows the configuration window for the 'Activity - document review'. The window has a sidebar on the left with icons for settings, users, configuration, and information. The main area contains the following fields and options:

- Name:** Document Review
- Type:** Document review
- Configuration:**
 - Input document/folder*:** Applications Folder (Process variable)
 - Classification:**
 - ☒ Allow operator to classify documents
 - ☒ Inherit classification group from process
 - Page rendition:**
 - ☒ Inherit settings from system
 - Imported documents:**
 - ☒ Inherit settings from process

8. Select the **Extraction** activity.

9. From the **Type** dropdown, select **Extraction** (Capture group).

10. Configure as shown:

The screenshot shows the configuration window for the 'Activity - Extraction'. The window has a sidebar on the left with icons for settings, users, configuration, and information. The main area contains the following fields and options:

- Name:** Extraction
- Type:** Extraction
- Configuration:**
 - Input document/folder*:** Applications Folder (Process variable)
 - Partial completion:**
 - Enable:** ☐

11. Select the **Validation** activity.

12. From the **Type** dropdown, select **Validation** (Capture group).

TECHNICAL TRAINING LAB INSTRUCTIONS

13. Configure as shown:

> Activity - Validation

Name: Validation

Type: Validation

Configuration

Capture

Input document/folder*: Applications Folder (Process variable) x

☐ Allow validation to complete with invalid fields

Validation operator settings

Classification

☒ Allow operator to classify documents

☒ Inherit classification group from process

Page rendition

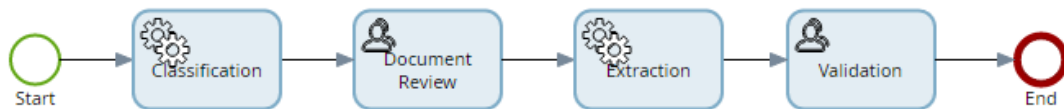
☒ Inherit settings from system

Imported documents

☒ Inherit settings from process

MFP ready: No

14. The process should look like this:



15. **Save** the process.

In this lab you will learn how to configure an SLA for an activity.

Lab 06-4

Configure a Simple Activity SLA

Specify Target Duration

In this part, you will learn how to add an SLA to a manual activity. Although not covered in this course, it is possible to escalate if the SLA is breached using a feature called Triggers.

1. Select the **Validation** activity.
2. From the **Properties** panel, select the **Time and cost** tab.
3. Set the **Target duration** property to **30 minutes**.

The screenshot shows the 'Activity - Validation' properties panel. The 'Target duration' section is highlighted with a red box, showing 'Days: 0', 'Hours: 0', 'Minutes: 30', and 'Seconds: 0'. The 'Target due date' dropdown is also highlighted with a red box, showing 'Lead time'.

Notes: (i) When a user takes an activity TotalAgility records the amount of time the activity is open (in a taken state).

(ii) If you are only interested in due dates you can just set the **Target Due Date**.

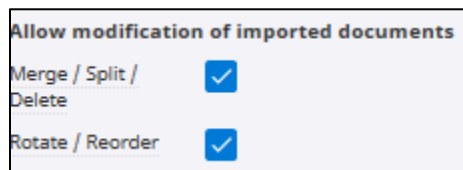
4. **Release** and **Close and unlock** the process.

Note: In the next lab you will be building forms for the process. It is generally recommended that you close the process before you build forms as TotalAgility will update the manual activities in the process with the names of the forms that are generated.

Lab Notes

Capture Properties of a Process

1. You can extract the text from a PDF and specify PDF Word Separation Characters using the **Extraction mode** and **Word separation** process properties.
Note: You will not be importing PDF's in this course. You can learn more about these settings in the online help.
2. If you are using Kofax Analytics with Kofax TotalAgility, you can check the **Capture process** checkbox. This option is available in the **History, reporting and execution** tab in the process properties.
Note: This option specifies whether a process can be considered as a capture process so that the data within Kofax Analytics for TotalAgility reports can be used to filter the data returned. We will not use Kofax Analytics in this course.
3. Note that you can prevent modification of imported documents i.e. documents that are not scanned. We do not change these settings in this class.



Node Colors

4. You can change the color of activities. From the **Main** menu navigate to **System > System settings**, and from the **Process** card, click **Process node colors**.

Revision Questions

1. A process that is marked as being initialized from scan must contain at least one process initialization variable of type folder/document and must have a classification group associated with the process capture properties?

2. When a process has its Initialize from scan property checked, you must assign a separation profile in the Capture link in the processes extended properties?

3. By default, the Classification, Document Review, Extraction, and Validation activities inherit the Classification group that has been defined in the processes Capture properties?

4. The Classification, Document Review, Extraction, and Validation activities all require an input document/folder?

5. When a process has its Initialize from scan property checked, you can still save the process without defining a document/folder initialization variable?

6. What is the purpose of setting an SLA for an activity e.g. Validation?
