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.

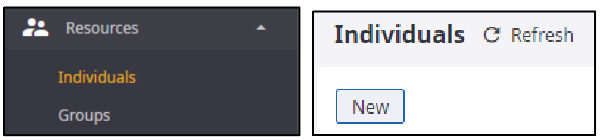
Lab 04-1

Resources and Basic Workflow Rules

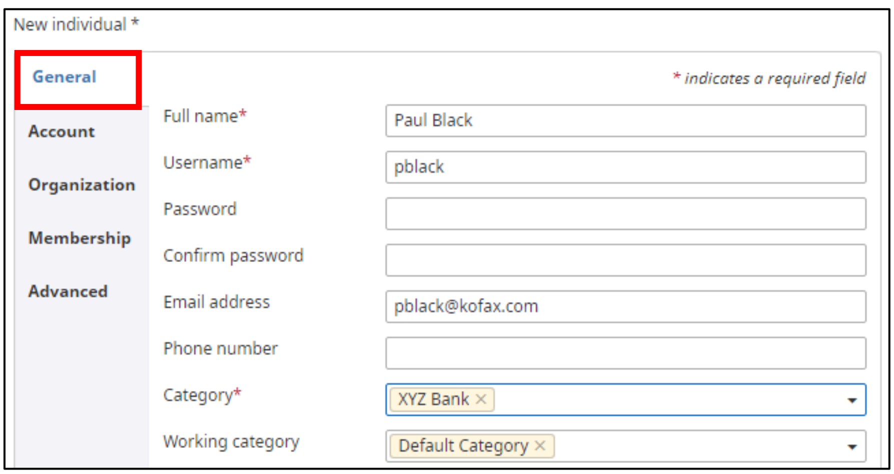
Create Resources

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

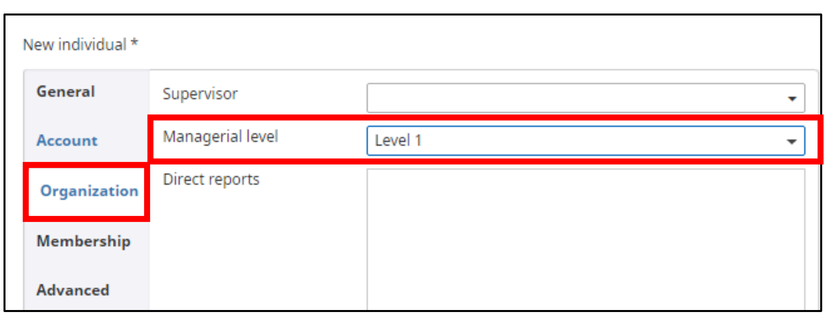
1. From the **Main** menu navigate to **Resources > Individuals**, and click **New**.



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



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



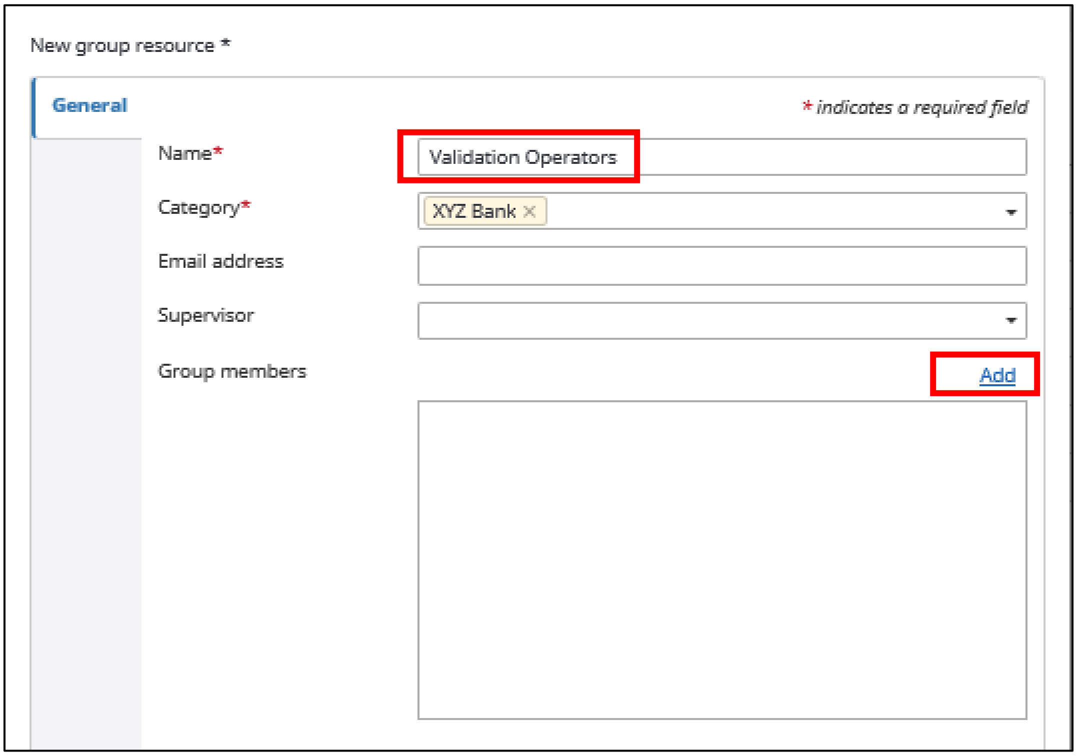
4. Click **Save**.

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

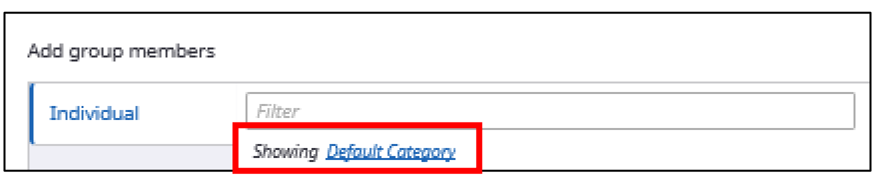
Create a Resource Group

In this part, you will create a Resource group.

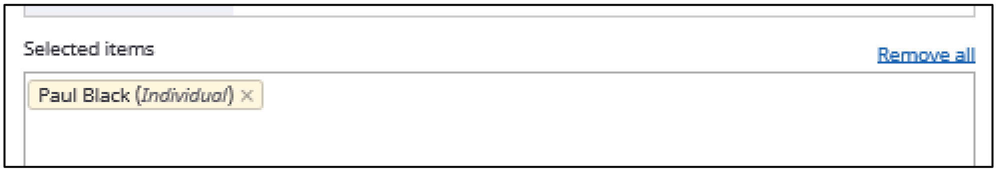
6. From the **Main** menu navigate to **Resources > Groups**, and click **New group**.
7. Add the Following **Group**:



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**.



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



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**.

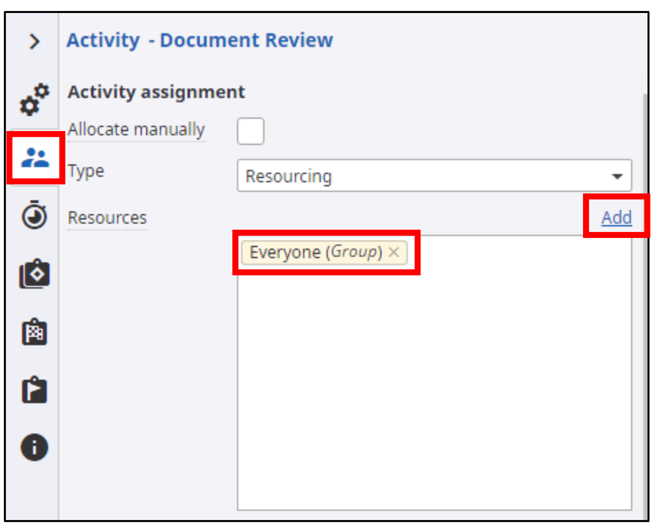
15. Click **Save**.

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.

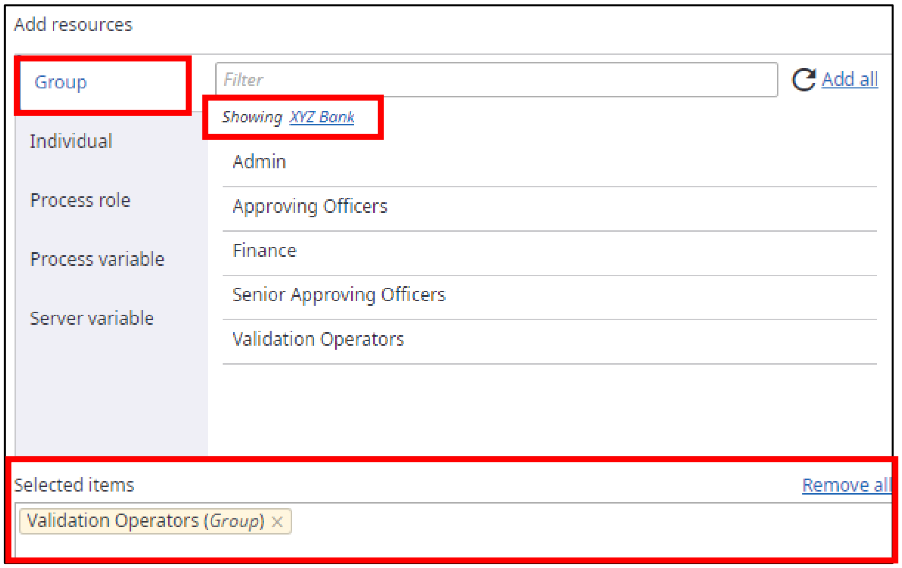


18. **Delete** the **Everyone** (*Group*) by clicking the **x** to the right of the group name.

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**.



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.

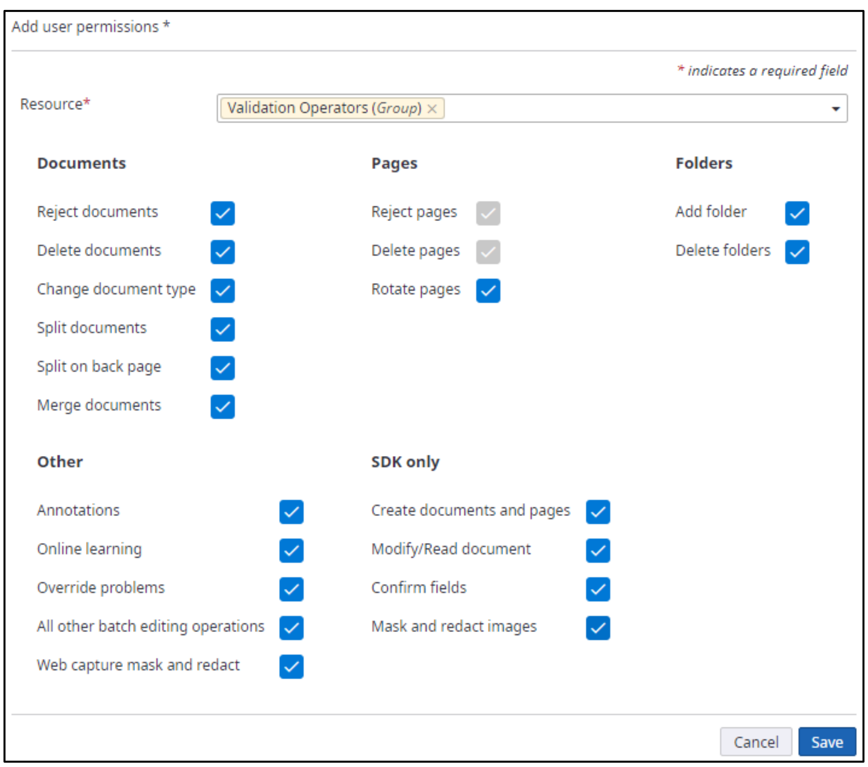
Lab 04-2

Assign Capture Runtime Operations

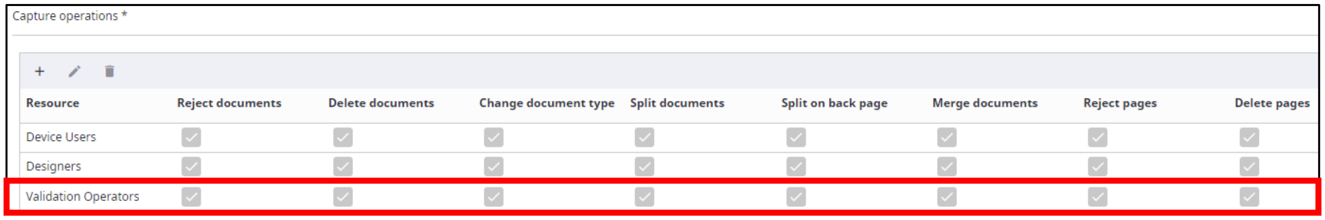
Assign Capture Runtime Operations to the Validation Operators Group

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**.



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



7. Click **Save**.

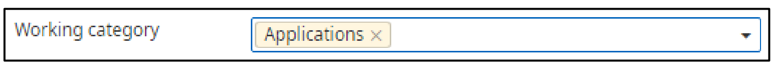
Lab 04-3

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**.



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

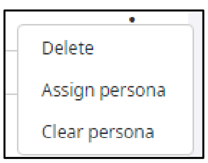
Lab 04-4 – Self Learning (Do not complete in class)

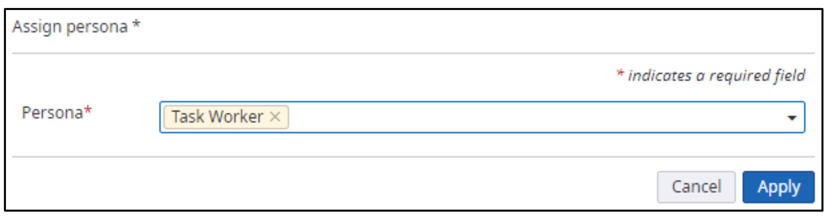
Assign a Persona to a Group

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**.





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?

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