The TotalAgility course requires that you import a package that contains processes, resources, and variables that are required to successfully complete the course. The course also requires the installation of MS Word templates, a database, and an IIS Virtual folder that are used later in the course.

If you are carrying out this training in an instructor led classroom, you will have access to a pre-configured training environment. If you are carrying out this training on your own laptop or PC, there are additional setup instructions that should be followed.

Lab 01-1

Course Pre-Requisites

On Demand Instructions - Extract Courseware

If using your own computer or virtual machine, you will have downloaded (On Demand) a file called **Resources.zip**.

1. Right click over **Resources.zip** and extract to the root of the C drive (there is no password).

2. After extraction navigate to **C:** and ensure there is a folder called **KTAEssentials**.

Classroom Instructions or Virtual Environment Hire - Extract Courseware

In the classroom, or if you are renting a virtual environment from Kofax (please contact us if you need to hire a virtual environment), you will have a file called **KTAEssentials.7z** in **C:\Courses** folder. Before you unzip this file, please check that you do *not* already have a folder called **C:\KTAEssentials** already installed on your environment. If you do *not* have this folder please follow the instructions below.
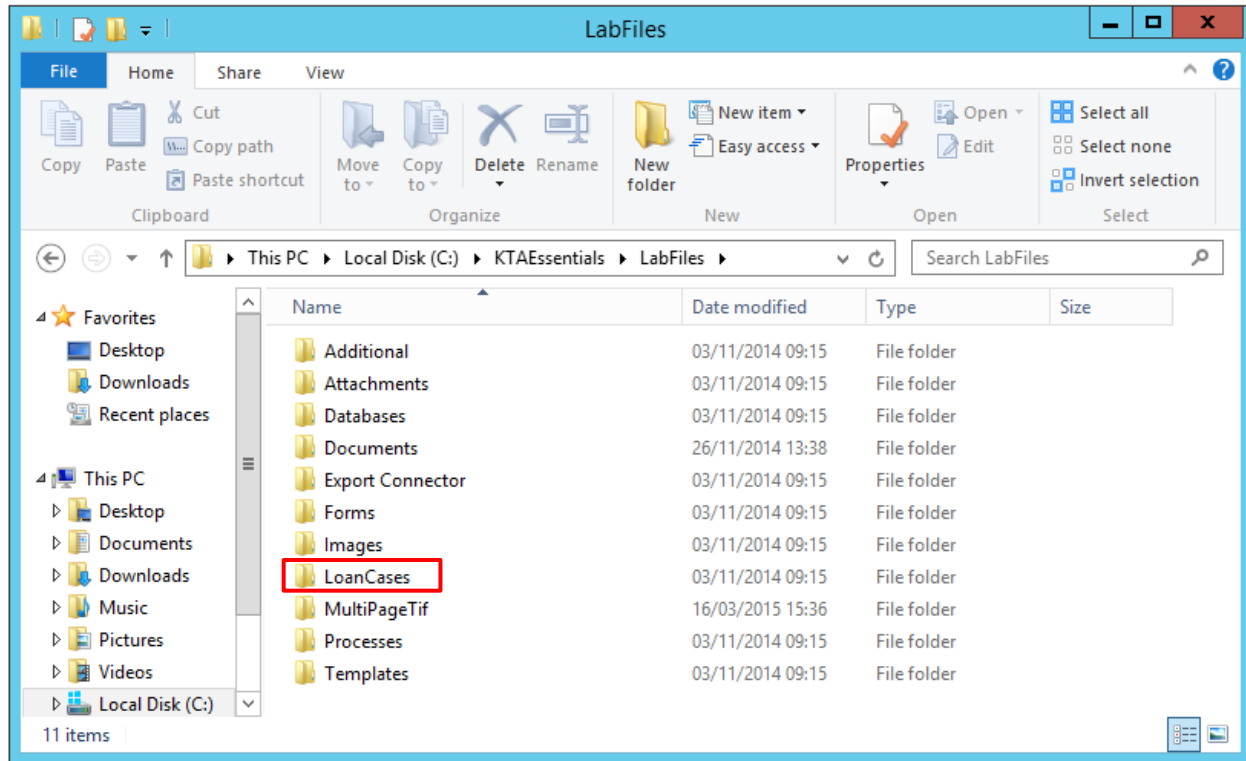
1. Right click over **KTAEssentials.7z** and extract to the root of the C drive. The password for extraction will be given to you by the instructor, or the person who issues your virtual environment instructions.

2. After extraction navigate to **C:** and ensure there is a folder called **KTAEssentials**.
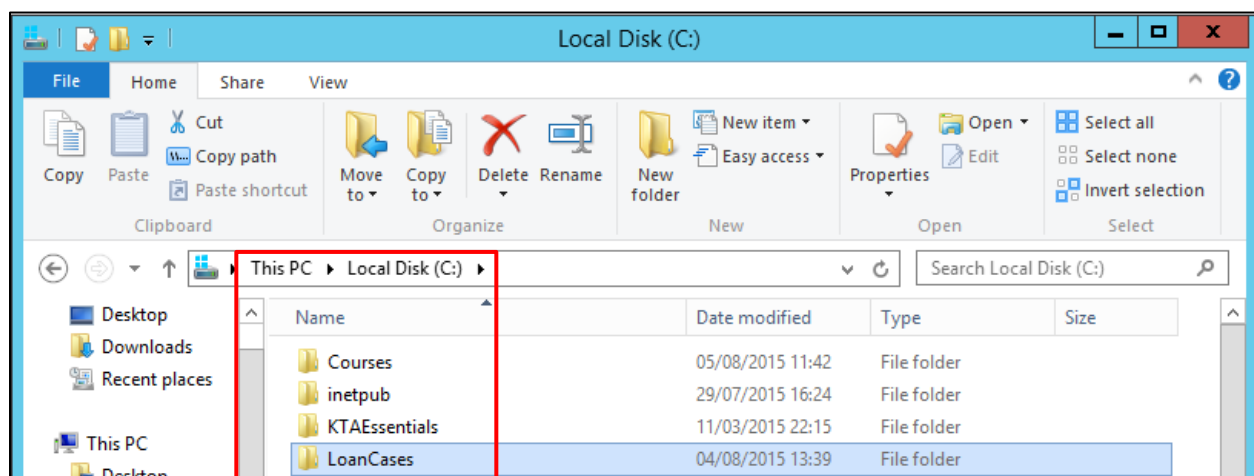
Install MS Word Templates

The course requires the installation of MS Word templates that are used later in the course.

1. Open **This PC** and **Navigate** to **C:\KTAEssentials\LabFiles**.

2. **Copy** the **LoanCases** folder to the **C drive** of your computer.

3. **Create** a **folder** called **C:\WatchedFolder** on the C drive of your computer.

Additional Course Pre-Requisites for Self-Learning Only

Software Pre-Requisites

If you are using you own computer you will need to ensure that you have the appropriate software to complete the course. Additionally you will need to configure a database on your own environment. Installation of TotalAgility is covered in Module 2. The software below is used on a *Kofax* training environment.

You should check the software compatibility matrix on the Kofax Support website if you choose to use other versions of O/S, IIS, or Database server:
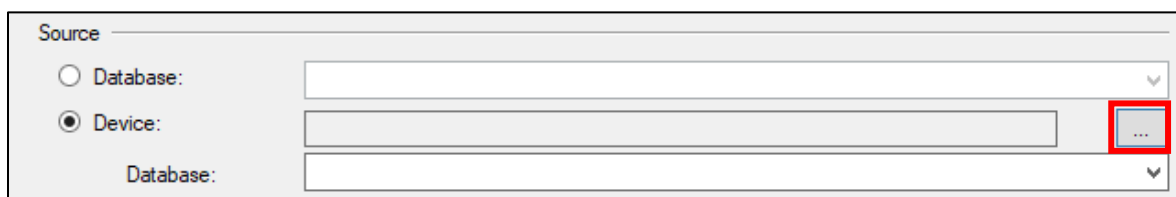https://knowledge.kofax.com/General_Support/Support_Details

1. Microsoft Windows Server 2019.

2. Microsoft SQL Server 2017.

3. Kofax Total Agility 7(with latest hotfix/service pack), i.e. 7.6.0
   Warning: If you download the KTA install media from the Internet, please ensure you unblock the zip file after download. Right click over the zip file and select Properties. Click the Unblock button before you extract.

4. Internet Information Services 10

5. Microsoft.NET 4.7 framework

6. Google Chrome (latest version)

7. Activity Email notification *may* not work on your own PC. The training image is configured to use a mail program that will send email to the localhost.

Database Restore

If you are using you own laptop or PC you will need to ensure that the following database is installed. The Customer database is used in some of the labs to demonstrate connecting to an external SQL database within a process or form.
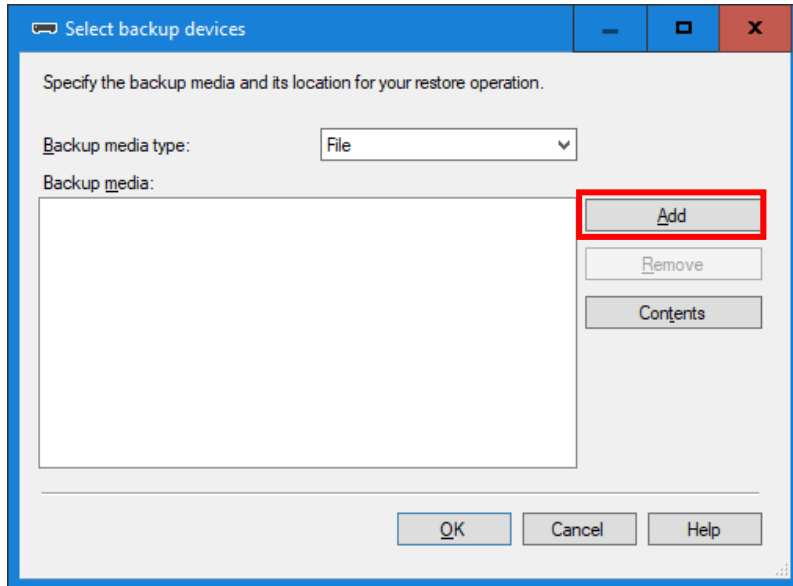
SQL 2017 Instructions

8. Steps for restoring the database in other versions of SQL and SQL Express are similar.

9. In **SQL Server Management Studio**, right click over the **Databases** folder and select **Restore Database…**

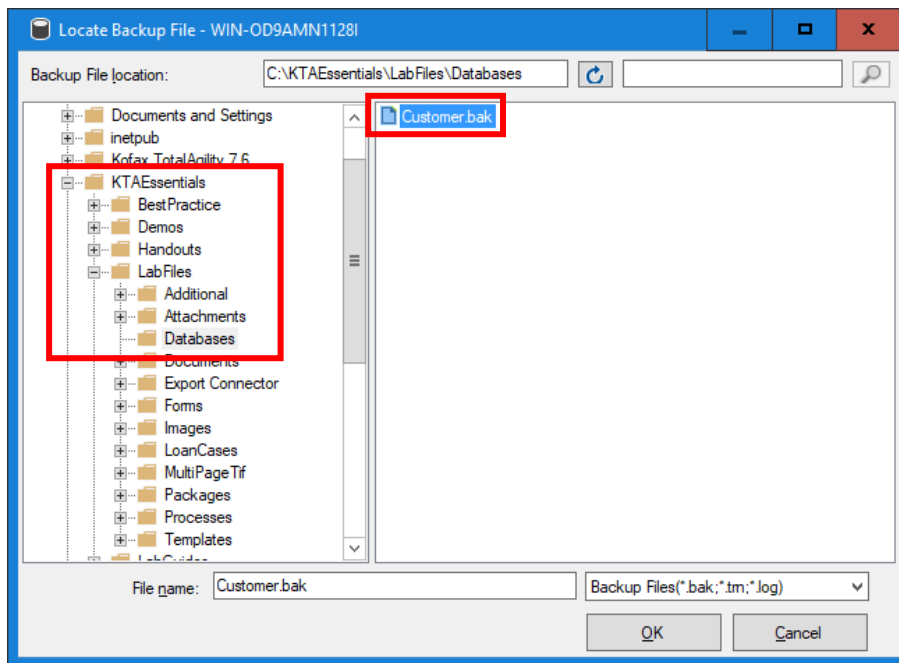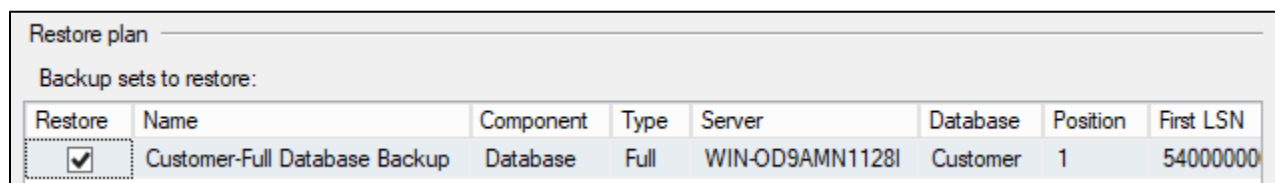10. Select **Source - Device** and click the **ellipse** button.

11. Click **Add**.

12. **Navigate** to and select **C:\KTAEssentials\LabFiles\Databases\Customer.bak**.

13. Click **OK** twice.

14. The **Restore** checkbox.

15. Click **OK** twice.

   Note: The Installer and Service accounts used to install Kofax TotalAgility both have SQL sysadmin role in the training environment. As such both accounts can access the Customer database.

Create Virtual Folder (Optional)

A virtual folder is used in one of the self-learning sections to demonstrate adding an attachment to a process. The path to the attachment must be a URL.

16. From the **Start** menu open **Internet Information Services (IIS) Manager**.

17. Expand **Machine Name**, then **Sites** and select **Default Web Site**.

18. Right-click over Default Web Site and select **Add Application**. Set the following values:

19. Click **OK** and **Close** Internet Information Services (IIS) Manager.

IMPORTANT NOTES

(i) Follow all instructions carefully, especially Lab02 – Installing Kofax TotalAgility.