In this lab you will learn how to install TotalAgility on a single server. In practice TotalAgility would typically be installed on multiple servers as per the architecture diagram that can be found in the slides for this lab. Complete instructions for installing the prerequisites can be found in the Lab Notes section. It will not be necessary to perform the prerequisite installations for this course as they have already been performed. A recording of the installation procedure is provided, as the installation will not be carried out in a classroom setting.

Lab 02-0

Recording of Installation

Installation Recoding

As an installation is normally only carried out by one or two people, we have provided a recording of the installation procedure. Installation will *not* take place in the classroom setting. A pre-installed environment will be provided in the training class. For those of you who wish to learn about the installation procedure we would advise you to watch the recording of the installation. You can then perform the following lab which will provided detailed information on the install and pre-requisites. There are no exam questions on the installation or pre-requisites.

1. Navigate to C:\KTAEssentials\Demos\Lab02 - Installing Kofax TotalAgility\ and open the Lab02 - Installing Kofax TotalAgility.html file. Watch the recording and then perform the lab instructions below on your own environment. Please read the Readme.txt file which is located in the same folder as the html file.

Lab 02-1

Installation Media, Accounts and Permissions

Installation Media

2. If you are downloading Kofax TotalAgility from the Kofax website, you should ensure that the zip file has not been *blocked* by Windows security.
3. **Right click** over the zip file and select **Properties**. If the file has been blocked, an **Unblock** button should be visible in the **General** tab. Click the **Unblock** button and then **Apply** and **OK** the changes.

Add Installer and Service Account Users

Before you carry out an installation you will create an installer and service account, and set appropriate permissions for these accounts.

4. Confirm that users were specified or created for use during install and as service accounts.
5. Click on **Start/Windows Administrative Tools/Computer Management**.

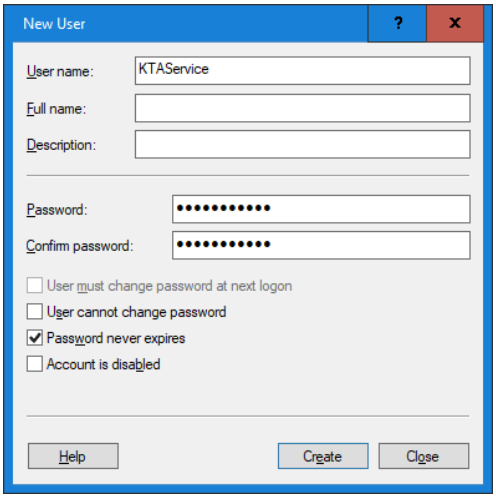
6. Select **Local Users and Groups**.
   Note: Two Windows users (Administrator and KTAService or equivalent) are generally required to install Kofax TotalAgility 7 and its prerequisites. A third user may be optionally created if SQL Server Authentication is to be used.

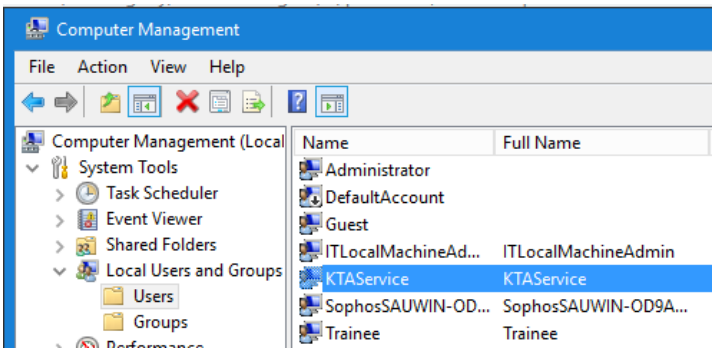
   a. **Administrator** or a member of the Administrators group (to perform installation). In this example the Trainee windows account is a member of the Administrators group, and will perform the installation.
   b. **KTAService** (or equivalent) **– Service account**, a domain user (in this example a local account), and is the account used to run the TotalAgility Core Worker, Transformation Server, Streaming, Export services, and must have permissions on the filing system (Program Data folder). In the training example the Transformation Server is running on the App/Web server. In this scenario the service account needs to be a local administrator of the server. If the Transformation Server is running on a different box, the App/Webserver service account requires the following permissions:
      a) Allow log on locally, Logon as a service, Bypass traverse checking permissions (Local Policies, User Rights Assignment).
      b) Read/Write permissions on the ProgramData folder.

      Notes: (i) For training purposes we will use the Trainee account to install the software.
      (ii) The installer of the software will become the owner of the TotalAgility databases.
      (iii) After installation, the service account has db_owner role membership on all the TotalAgility databases. The minimum privileges for the KTAService account on the TotalAgility databases would be Read/Write/Execute. You could create an executor role in each TotalAgility database specifically for this. You could then assign the read/write/executor role to the KTAService login (User Mapping).

7. Right click over the **Users** folder.

   Create a user for the **Service Account**:
   User name: **KTAService**
   Password: **W0rkstation!** (capital W then a zero, exclamation mark at the end)
   De-select **User must change password at next logon**
   Select **Password never expires**





8. Click **Create.**

9. **Close** the **New User** dialog (leave Computer Management open for the next part).

Give the Service Account Appropriate Windows Permissions

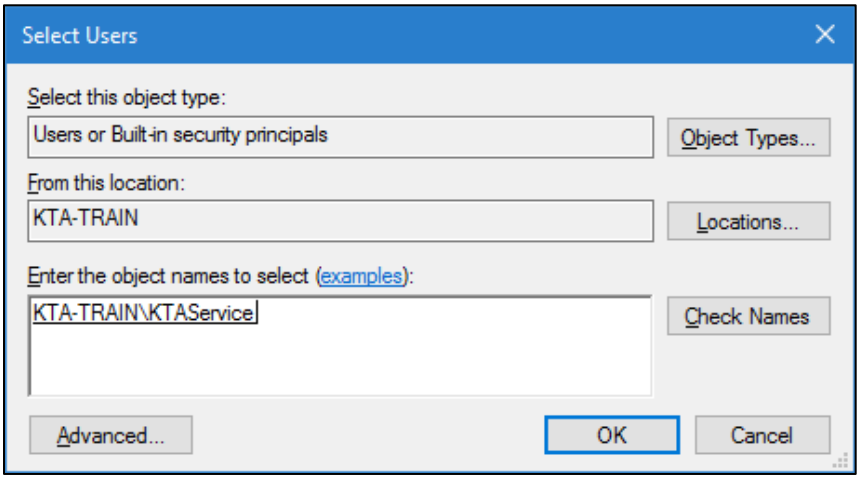
To simplify the installation in training, you will make the service account a local administrator of the server. The service account requires runtime access to the ProgramData area of the server, and requires certain permissions to run the Streaming Service and Transformation Server.
Notes:
(i) The Logon as a service permission is **not** automatically granted to the Administrators group and will be added in the next part.
(ii) On a production system, there may be a requirement to not add the service account as a local administrator. Further information on the exact permissions required in this scenario are provided in the Installation guide.

10. Select **Groups** under **Local Users and Groups**.

11. Double click the **Administrators** group.

12. Click **Add...**

13. Enter **KTAService** and click **Check Names**.

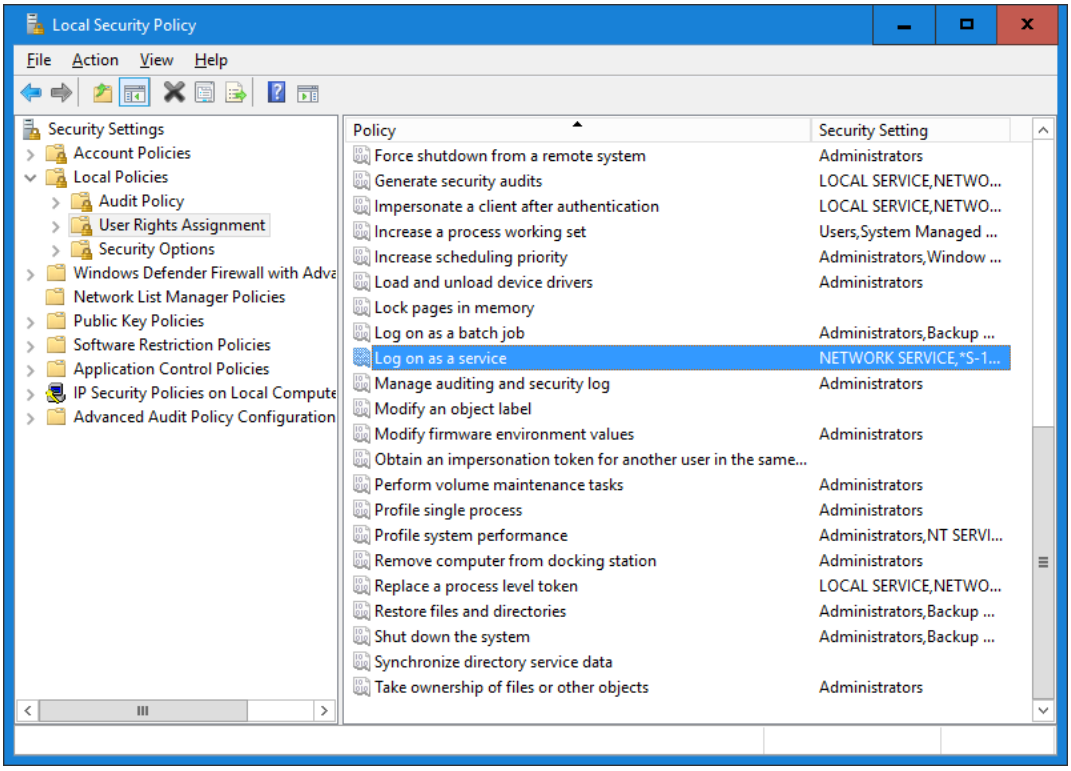


14. Click **OK** twice.

Add the Log On As A Service Right to the Service Account

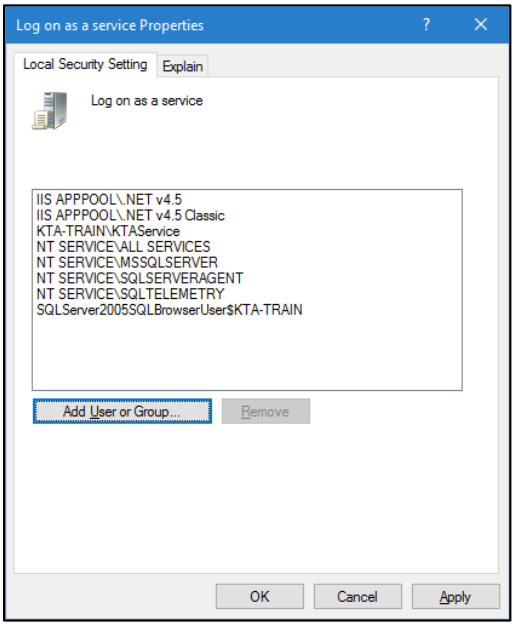
To run the services the KTAService account must be granted the Log On As A Service right.

15. Open **Local Security Policy** by opening Start\Windows Administrative Tools**Local Security Policy**:



16. Expand **Local Policies**, select **User Rights Assignment**, and double click **Log on as a Service** in the right-hand panel.

17. Add the **KTAService** so that they have **Log on as a service** rights. You can type the KTAService account name or use the Advanced… button to locate the account.



18. Click **OK**.

19. Close any open windows.

Lab 02-2

Install with Automatic Database Creation

You can either create the databases manually or let the installation wizard create the Kofax TotalAgility databases. In this part you will use the installation wizard to create the databases. You will connect to SQL Server, and add the KTAService account as a Login to SQL Server. You will also set the appropriate permissions for the Installer and Service accounts. The installer account creates the databases during the wizard. Also note that you can also install TotalAgility using a silent install. Manual database creation notes can be found in the Lab Notes section.

Add the Service Account as an SQL Login and Set Service Account SQL Permissions

1. Open Start/**Microsoft SQL Server Tools 17/SQL Server Management Studio** or use the shortcut provided on the taskbar in the training environment.
2. Click on **Connect**.
3. Expand the **Security** folder, and expand the **Logins** folder.
4. **Right-click** over the **Logins** folder and select **New Login...**
5. Locate the **KTAService** account using the **Search** button.
6. Select **Windows Authentication**.
7. Select **Server Roles** and check **dbcreator** (this is only required if you are installing via the wizard). You can still install KTA without this role being set. However you should grant the service account read/write/execute permissions (minimum) on the databases, post install.
8. Click **OK**.

Add the Installer Account as an SQL Login and Set Installer SQL Permissions

9. The **Trainee** account is the installer account. This account has already been added as a SQL login in the training environment.
10. Expand the **Security** folder in **SQL Management Studio**.
11. Double click on the **Trainee** account.
12. Select **Server Roles.** In the training environment the Installer (Trainee) account has a **sysadmin** role. The minimum permissions required would be the **dbcreator** server role.
    Notes: (i) **dbcreator** enables the Wizard to create databases.
    (ii) **dbcreator** enables Wizard to initialize databases (as the creator is the default owner, and therefore has the associated owner privileges).
    (iii) The service account is granted the db_owner role after the install.
13. Click on **File/Exit** to exit SQL Server Management Studio.

Lab 02-3

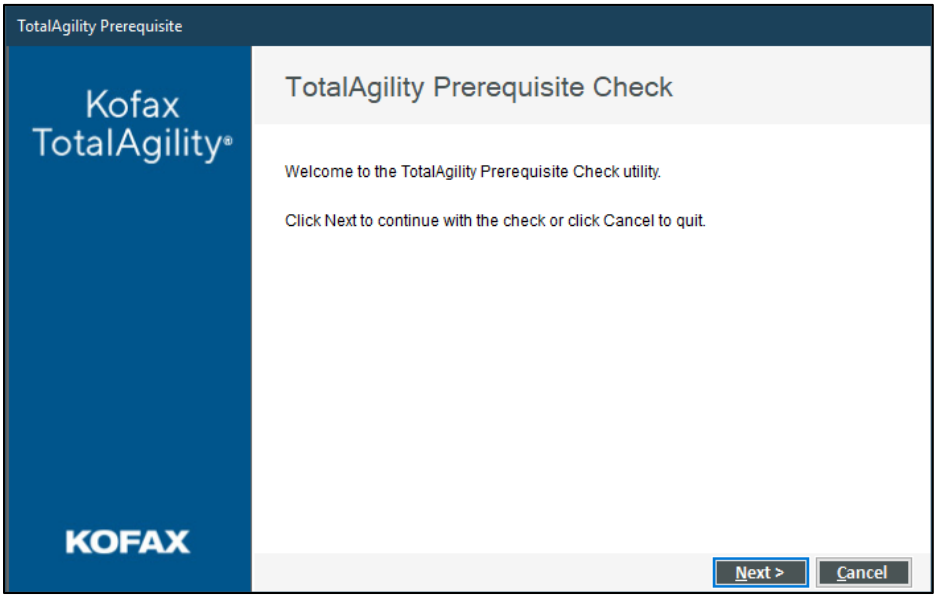
Installation Prerequisites

In this part you examine the pre-requisites to install Kofax TotalAgility 7.6. Note that the following software has already been installed if you are attending the Kofax Essentials training class. If you are completing this training on demand, you must install and configure the pre-requisite software listed in the notes section.
Please note that you should read the Installation Guide which can be downloaded from the customer/partner support portal: KofaxTotalAgilityInstallationGuide_EN.pdf
The installation guide gives a complete list of pre-requisites.

Prerequisite Utility for Kofax TotalAgility 7

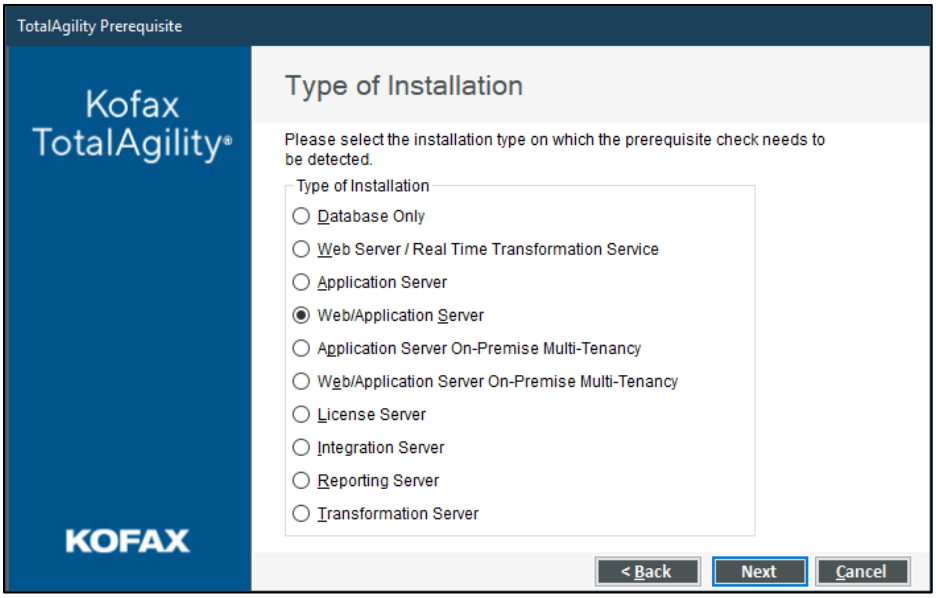
TotalAgility comes with a utility that will check for the pre-requisite software required for an installation. In this example you will check that the required software is pre-installed for a Web/Application installation.

1. Open windows **File Explorer**, and navigate to C:\Kofax TotalAgility 7.6\TotalAgility\Utilities\Pre-requisite Utility\
2. Right click over **Agility.Installation.Server.Prerequisites.exe** and select **Run as administrator**.



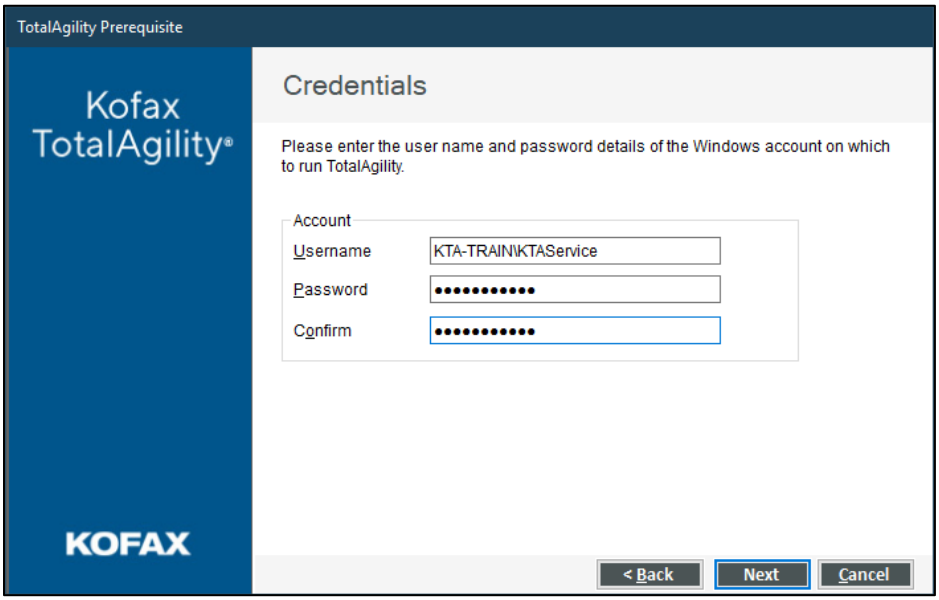
3. Click **Next**.

4. Choose **Web/Application Server**.



5. Click **Next**.

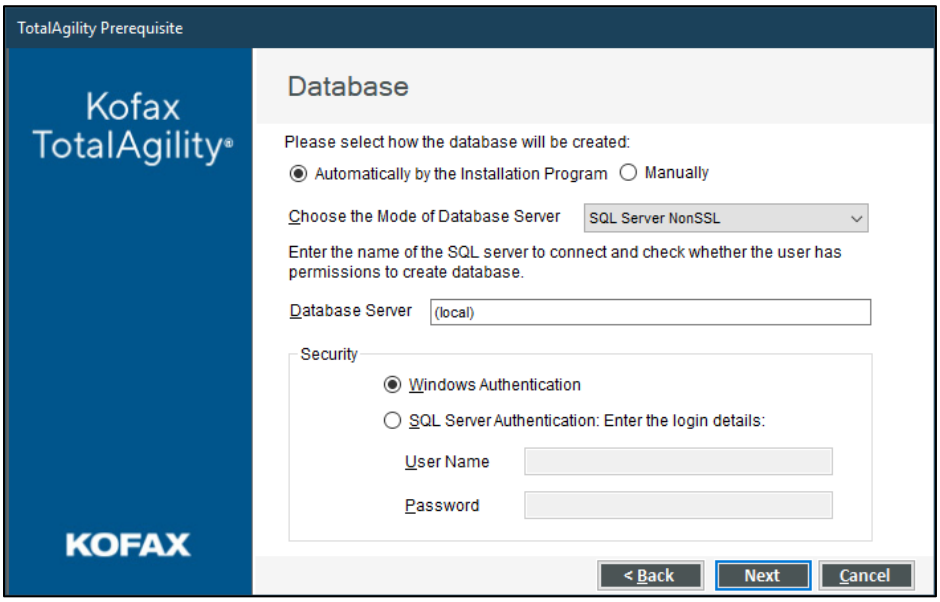
6. Enter the service account credentials:



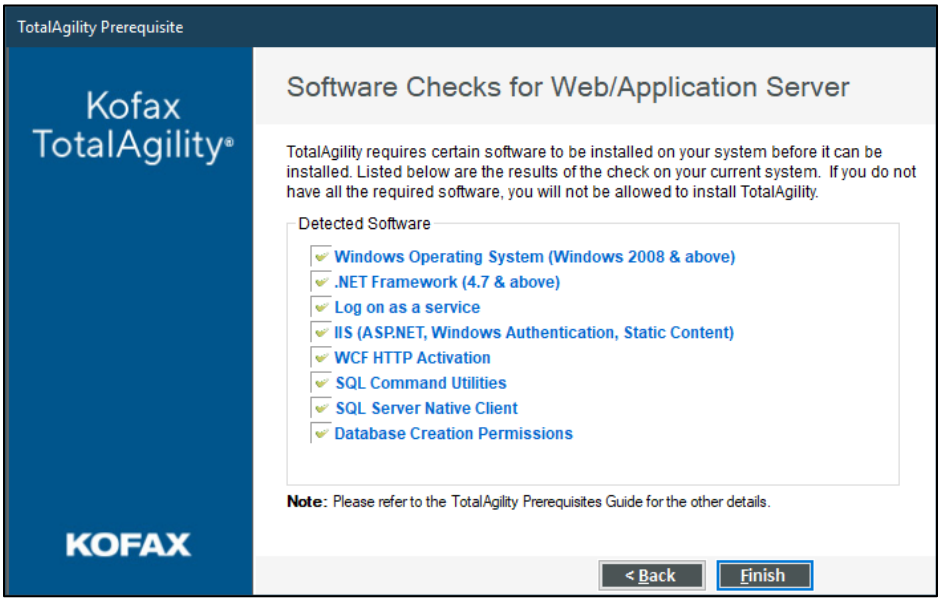
Note: Password is W0rkstation (capital W and then zero).

7. Click **Next**.

8. Select **Automatically by the Installation Program** and select **SQL Server NonSSL**. Leave all other settings at the default.



9. Click **Next**.



10. In the above example the general pre-requisites have been met.

11. Click **Finish**.

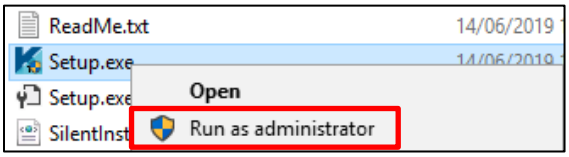
In this training example the Kofax TotalAgility installation media has been copied to your virtual environment to C:\Kofax TotalAgility 7.6. If you have a separate Application/Web server and Transformation server you can install the relevant components on the TotalAgility Application/Web server and Transformation Server. The Transformation Designer can be installed on any client PC. The Transformation designer and server executable install files can be found in:
C:\Kofax TotalAgility 7.6\TotalAgility\TransformationDesigner
C:\Kofax TotalAgility 7.6\TotalAgility\TransformationServer

Lab 02-4

Installing Kofax TotalAgility 7

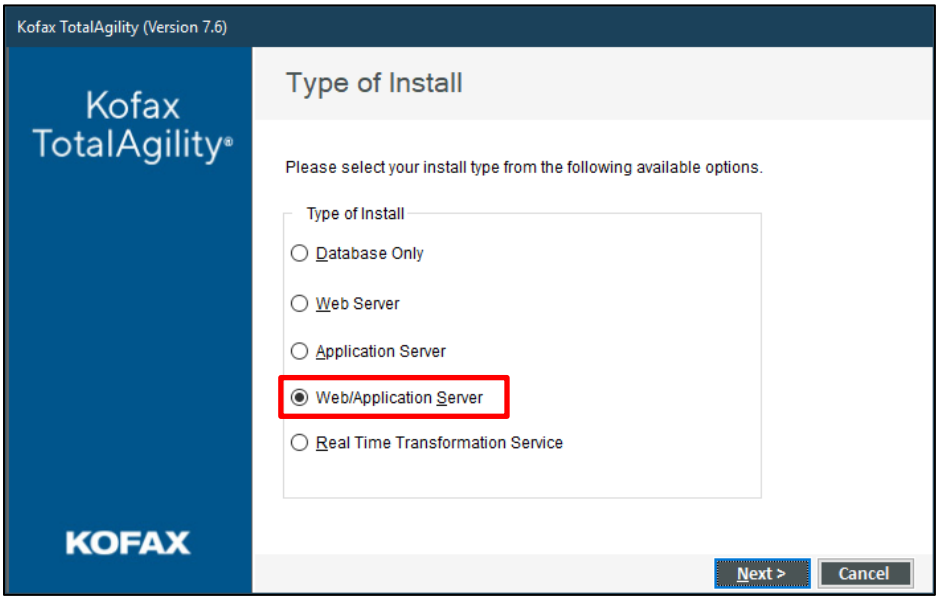
To install Kofax TotalAgility, do the following:

1. Open C:\Kofax TotalAgility 7.6\TotalAgility\TotalAgilityInstall\
2. Right click **Setup.exe** for Kofax TotalAgility 7.6 located in the **TotalAgilityInstall** folder and select **Run as administrator**.



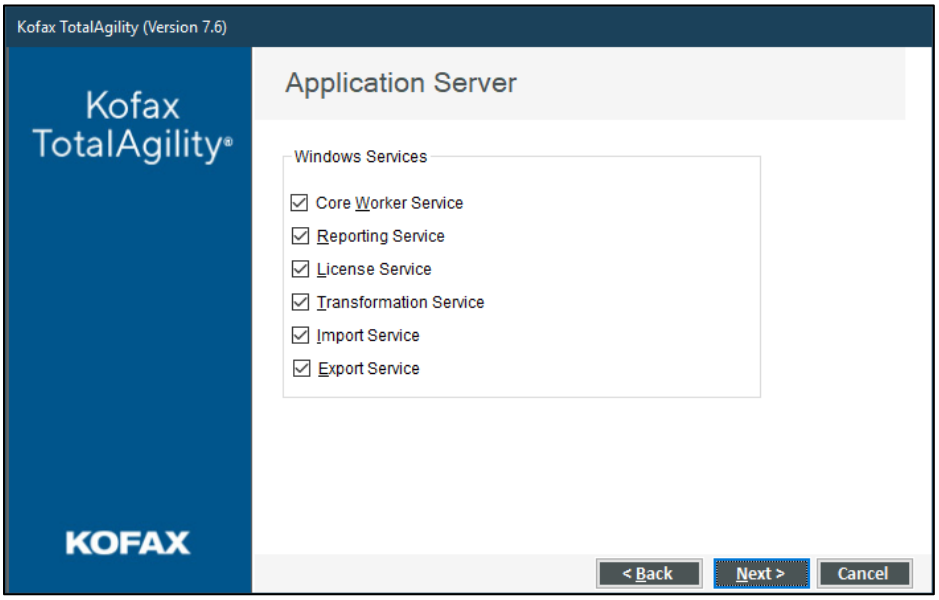
3. You will see a splash screen, click **Next**. Then you will see the Kofax Inc. Software License Agreement. **Accept** the license agreement and then click **Next**.

4. The installation types are displayed. Select **Web/Application** Server:



Note: Depending on the option chosen, the screens of the wizard will differ.

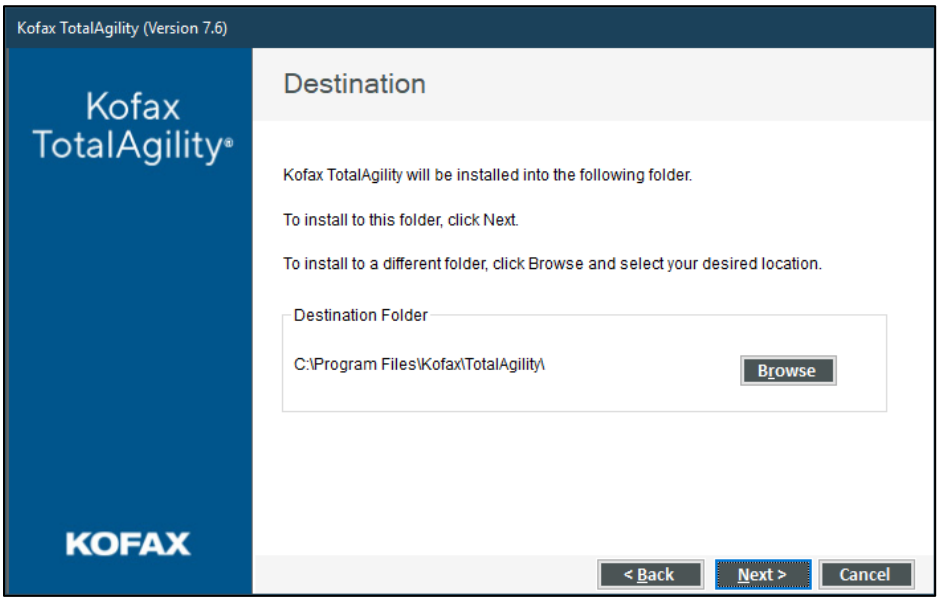
5. Click **Next**. A list of KTA Services are displayed.



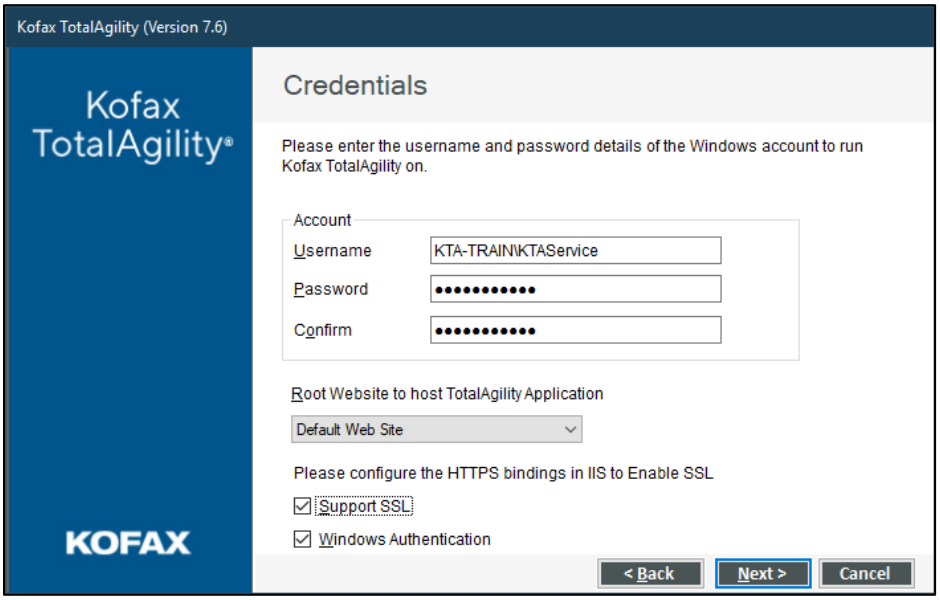
Notes: (i) In a non-training environment, you will probably have e.g. a separate license server, transformation server, app server, web server etc. You may therefore only wish to install the services appropriate to that server type.
(ii) The services are only shown in the wizard, if you have chosen an Application Server or Web/Application Server install.

6. Click **Next**.

7. The **Software Destination** screen appears.
   Note: The default location of the folder where Kofax TotalAgility will be installed appears. You may choose a different location, if required.



8. Click **Next**. The Windows Account screen appears.
9. Configure the **Service Account** as follows.
10. Enter **KTAService** as the user name and **W0rkstation!** (capital W then a zero, and an exclamation mark at the end) as the password of the Windows account used to run Kofax TotalAgility services. When specifying a user name and password other than your Windows account, you must ensure that the account has the rights to logon as a service in your local security policy.
    Note: The Trainee (Installer) account will be created as a user inside TotalAgility after installation (not the service account!).

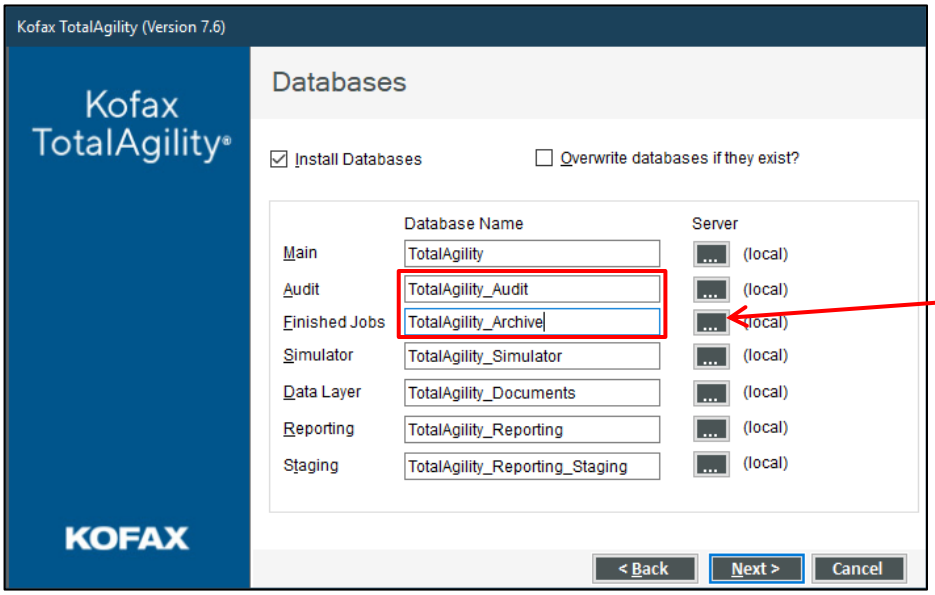


11. Check the **Support SSL** checkbox.
    Notes: (i) The SSL option is only available if the https binding is configured in IIS. You will also need to generate a certificate if you are using SSL.
    (ii) You do not have to use SSL for training, but we would strongly recommend using SSL in development and production environments.

12. Leave **Windows Authentication** checked for the TotalAgility application.

13. Click **Next**. The Databases screen appears.

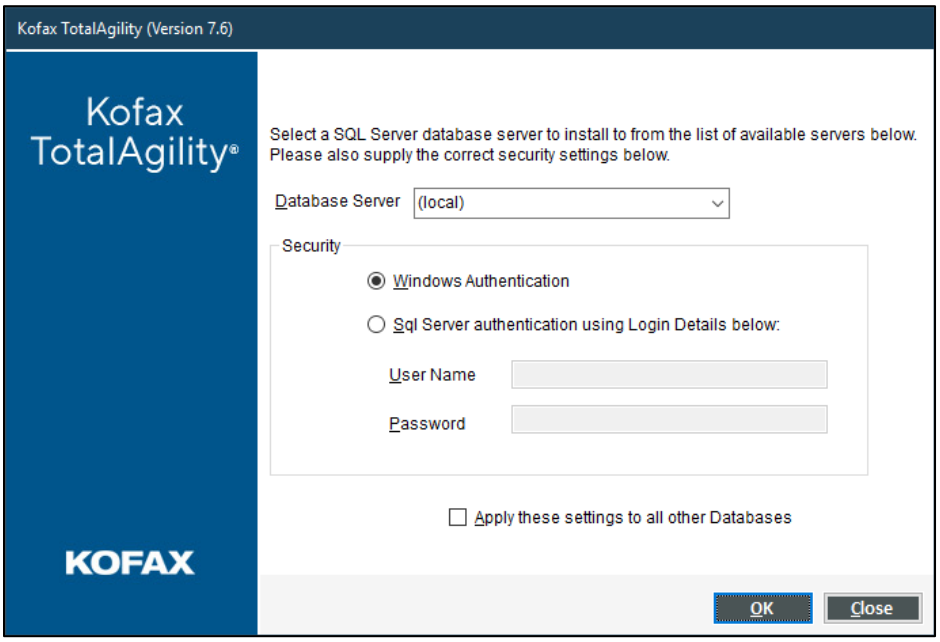
14. **Modify** the database names for **Audit** and **Finished Jobs** as shown:



Click on any one of the ellipsis buttons to select e.g. a remote database server

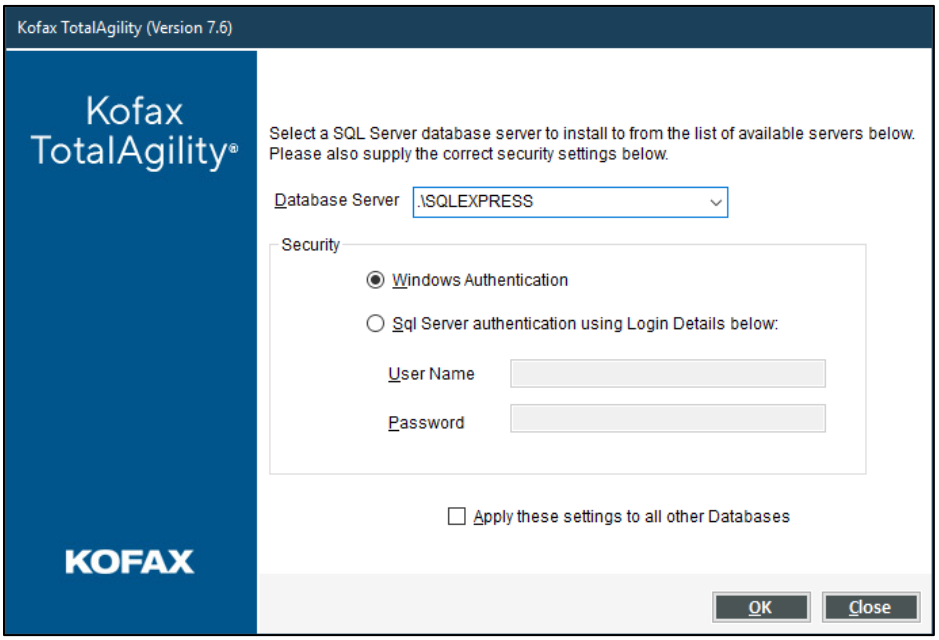
Notes: (i) It is generally recommened to split the Audit entries and finsihed jobs out into separate databases rather than having this information stored in the live TotalAgility database.
(ii) Only select Overwrite databases if they exist? If the databases have been created prior to running setup. This option will initialize the databases with the tables, stored procs etc. It will not overwrite the original databases.

15. Click on any one of the ellipsis buttons and select the database server. The database security settings screen appears. The security default is Windows Authentication.

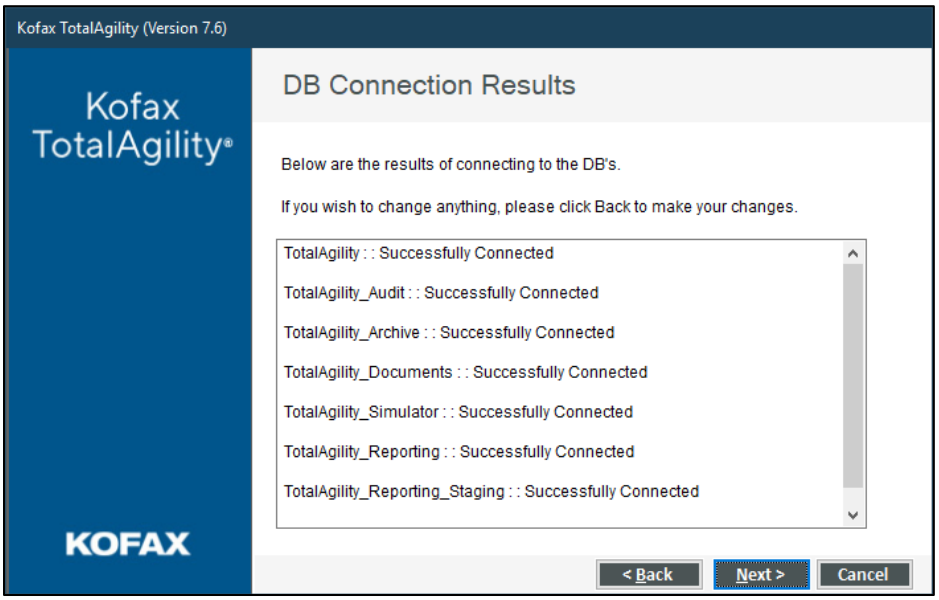


16. Fill in the account information as shown. For this class, we will be using **Windows Authentication** (you do not need to modify the settings in the training class). If you are using SQL Server Authentication, use the appropriate SQL Server account.
Important: Click the checkbox for **Apply these settings to all other Databases**. Click OK.

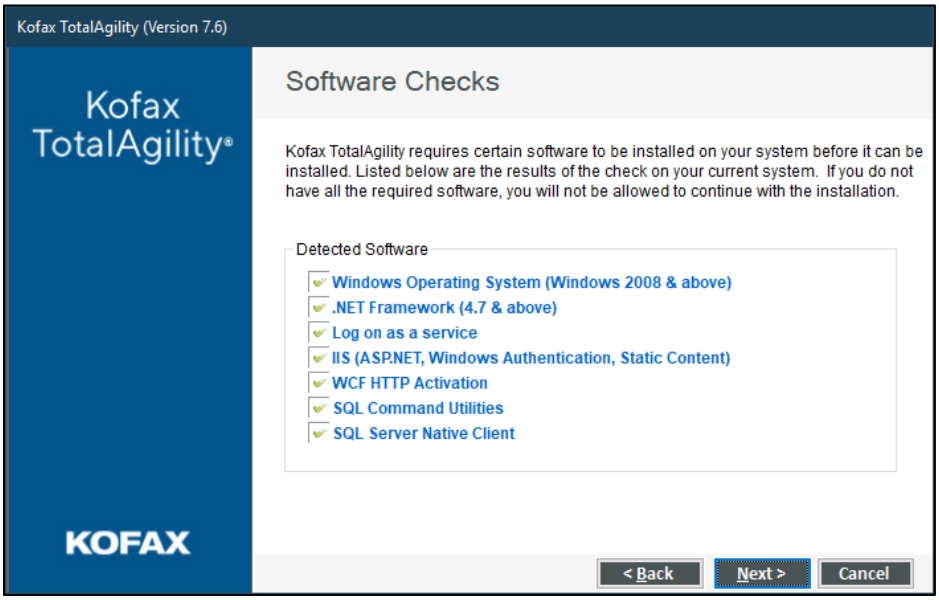
17. If you are using **SQL Express** (non-production environments only) please ensure you enter the SQL Express Default Instance or the Named Instance, and Apply to all other Databases. Note that SQL Express is not officially supported.



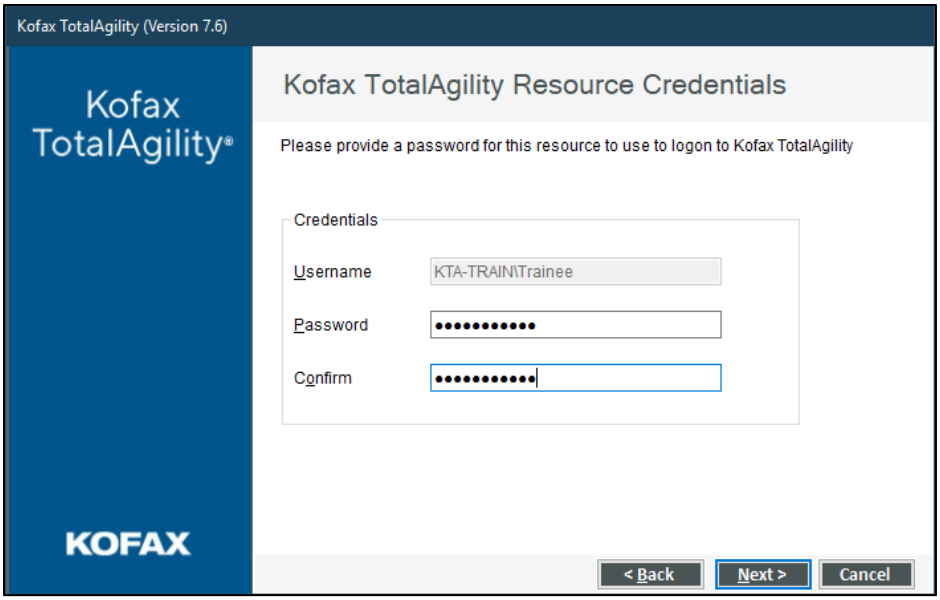
18. Click **Next**. The DB Connection Results screen appears. Check that all databases were successfully connected to.



19. Click **Next**. A list of the required software and the status of each item appears.

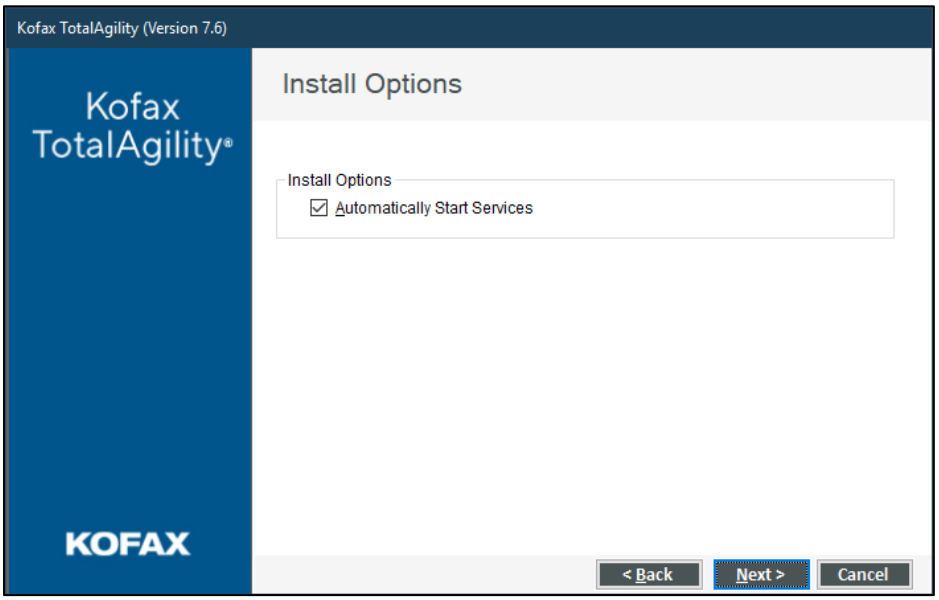


20. Click **Next**. The **Kofax TotalAgility Resource Credentials** screen is displayed.



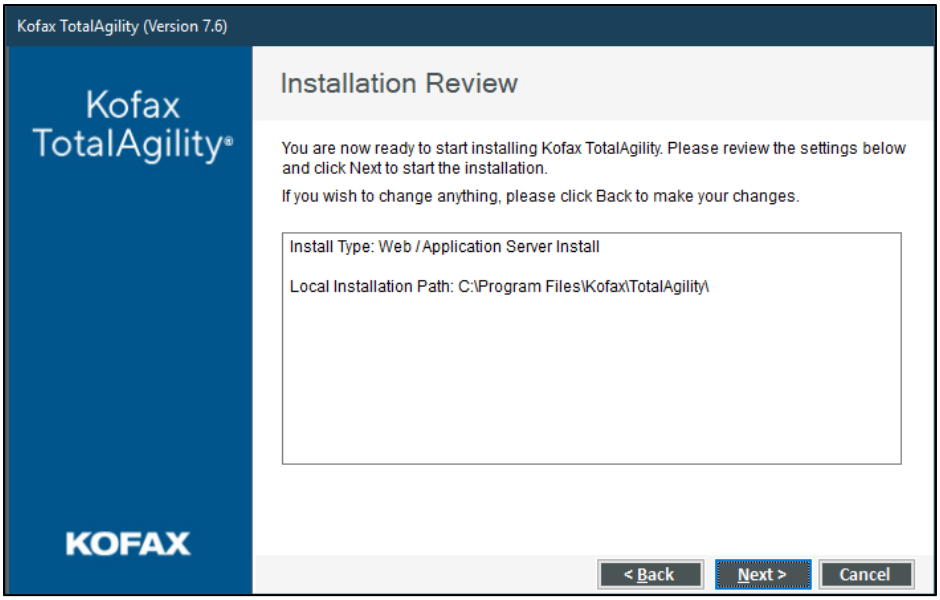
21. Enter **W0rkstation!** in the Password and Confirm textboxes.
    Note: The Trainee (Installer) account will be created in TotalAgility, and will be used to Logon after the installation. The Windows password is not stored in TotalAgility.

22. Click **Next**. The **Install Options** screen is displayed.

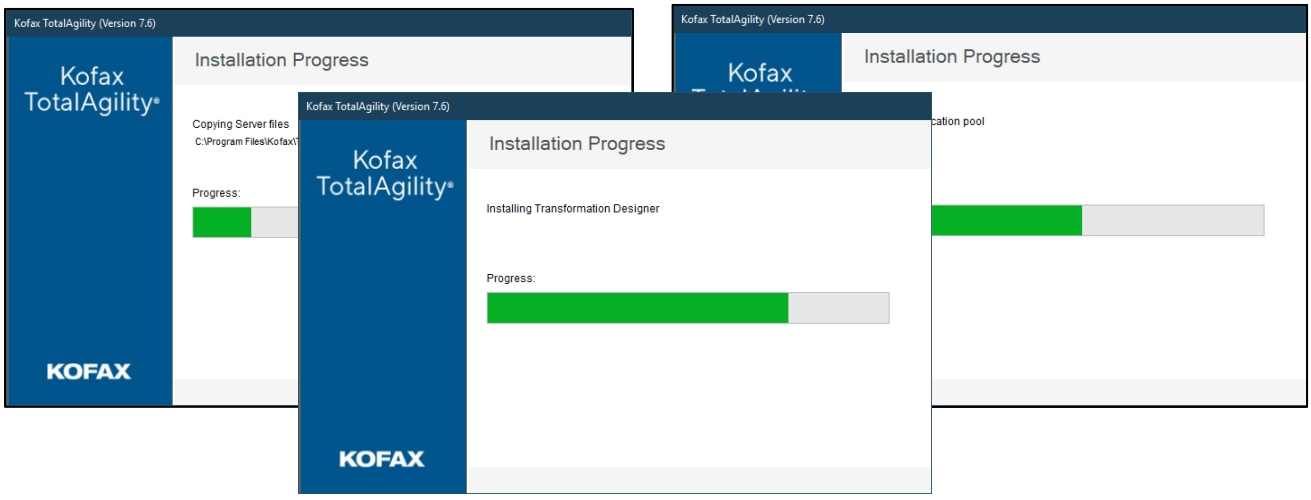


Notes: The Kofax TotalAgility Services will start automatically.

23. Click **Next**. The Installation Review screen appears.

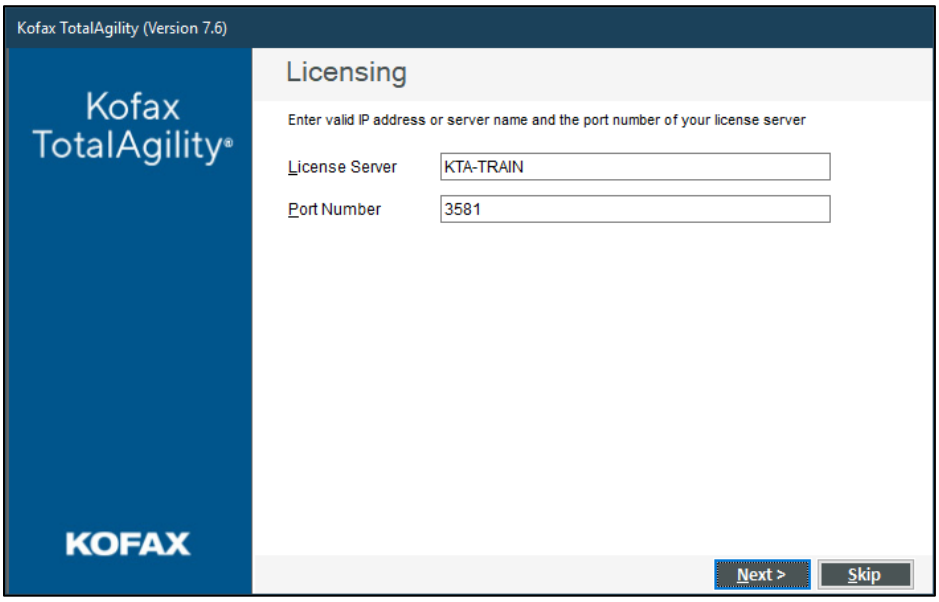


24. After reviewing the settings, click **Next**. Setup installs the required files, databases, and other integrated products.



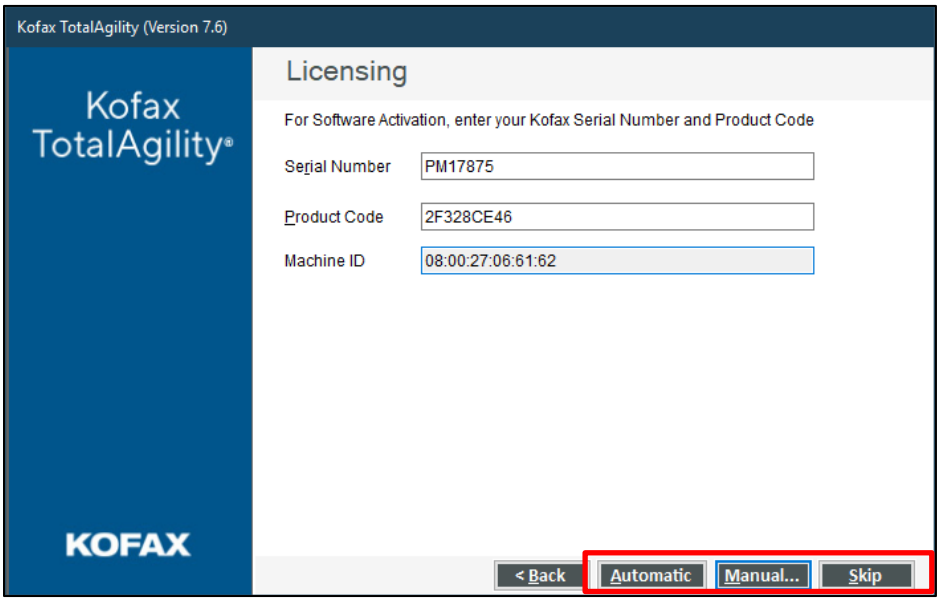
25. The Licensing screen will appear after the Kofax TotalAgility 7 components are installed.

26. For the purposes of this training class you can leave the local **Machine Name** as the License Server and leave the port as **3581**. Note that you can also enter **127.0.0.1** or **localhost** as the license server. If you are using a dedicated license server, you can also enter the server name or IP address into the License Server textbox.



27. Click **Next**.

28. Enter the **Serial Number** and **Product Code** received on purchase of the product (As noted previously, use the information provided in class).
Notes: (i) By default the **MAC** Address of your machine is automatically detected and entered in the Machine ID box.
(ii) The **Serial Number** and **Product Code** appear by default if the License Server is a shared license server.



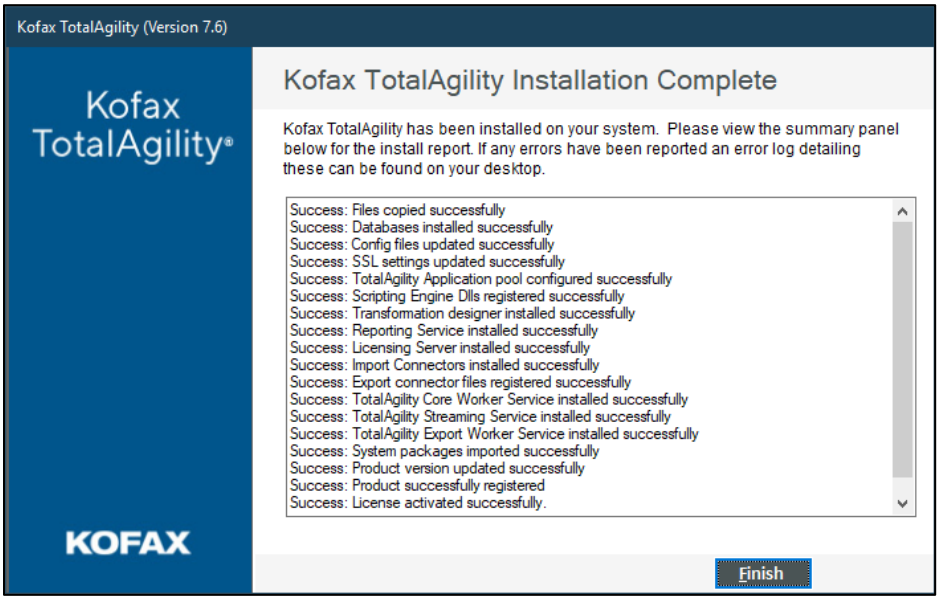
29. Before continuing please read the following definitions of each button. The instructor will advise as to which activation option to use. This can differ depending on connectivity.

Automatic: Use this option when internet connectivity is available. The license is activated

online.
Skip: If you skip activating the license, a warning appears to inform that you need to activate the license.
Manual: Use this option when there is no internet connectivity or if automatic activation is unsuccessful. Configure the following details:

1. From the Licensing screen **copy** (CTRL-C) the **Machine ID**.
2. Open a **Browser** and go to http://activatelegacy.kofax.com/support/Activation/manual.aspx
3. Enter **Serial Number**
4. Enter **Email address**
5. Click **Next**
6. Follow the onscreen instructions to complete the information required. At this time paste the Machine ID into the Machine ID field.
7. Click **Submit**.
8. Copy the returned **License Activation Code** and paste it into the Manual Activation Window in TotalAgility.

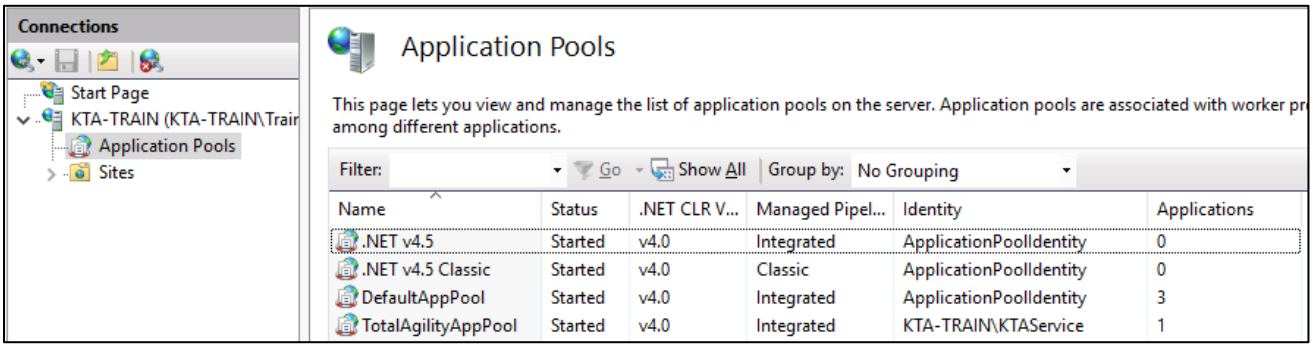
30. If successfully activates you will see the Installation Complete screen. Please check this screen to ensure everything was installed successfully.



31. Click **Finish**.

32. The Kofax TotalAgility 7 Installation is now complete. You will be asked if you wish to install the Transformation Server/Core Modules. Before you install the Transformation Server you may wish to check if there have been any installation errors.
Notes: (i) An Application Pool called **TotalAgilityAppPool** is installed in IIS. The app pool

should run under the identity of the service account. You can check this by opening up IIS and clicking on Application Pools.



(ii) The TotalAgility databases and services are now installed.

Installation Errors

33. If an error occurs during installation, a text **Log** file will be written to the desktop.

34. Read the log file and check the **Windows Event Viewer** or **Server Manager** for any messages.

35. If there is an error in the Transformation Designer/Server install check the **Transformation Server Log** files:
C:\Program Files\Kofax\TotalAgility\Transformation Server\KofaxCPUServerLog.log

36. Most installation failures occur due to *insufficient permissions* or *pre-requisite* software not being installed. Check the permissions and check adherence to all pre-requisites.

37. If you are unable to install without errors, uninstall Kofax TotalAgility from control panel, delete the SQL databases in SQL Server, remove any Kofax program group remnants in Program Files and Program Files (x86), remove the (hidden) TotalAgility Installation Information folder in Program Files, and try re-installing.

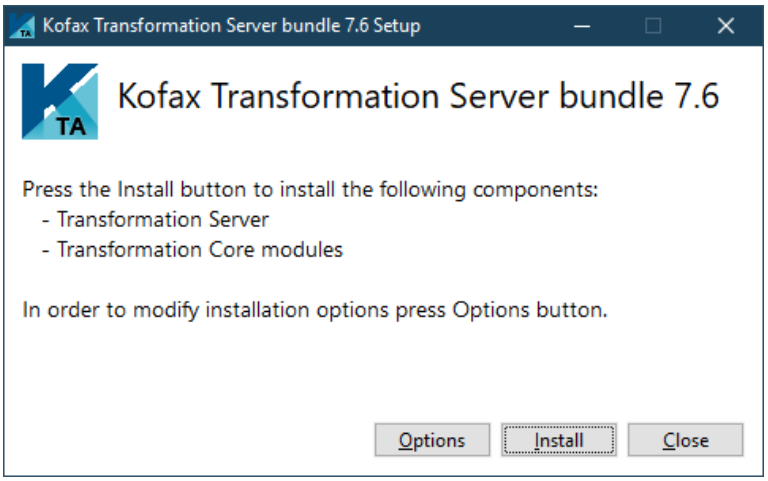
Lab 02-5

Installing the Kofax Transformation Server

For this class, it is necessary to install the Kofax Transformation Server/Core Modules to execute the automatic capture activities at run time. In practice the Transformation Server would typically be installed on one or more servers depending on the volume of the ingested documents.
The Setup.exe for the Transformation Server can be found in the installation media: TotalAgility\TransformationServer\setup.exe.

To install the Kofax Transformation Server, do the following:

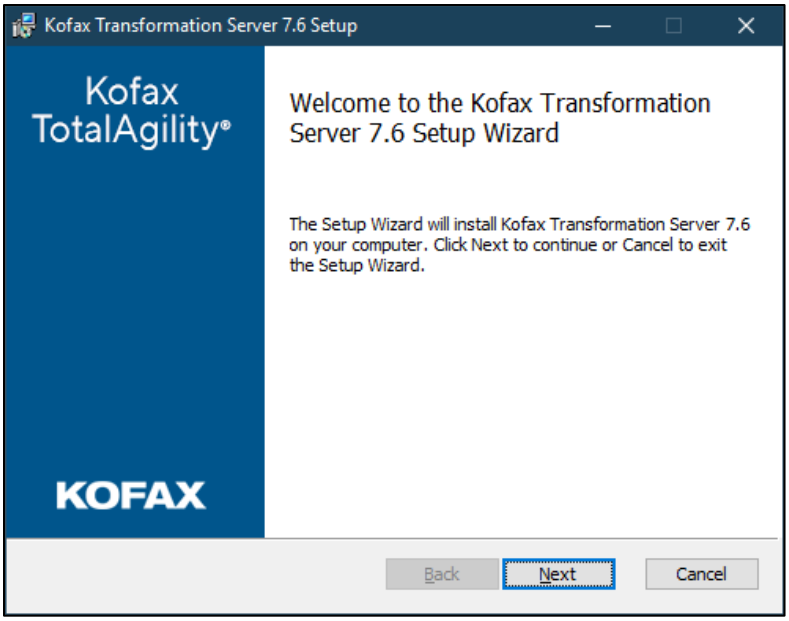
1. On **completion** of the **Kofax TotalAgility installation**, a message appears asking if you want to install Transformation Server.



Notes: (i) You can also run the Transformation Server setup separately on a different server. Locate Setup.exe in the Transformation Server folder in the install media. You will need to point the Transformation Server to the Kofax TotalAgility database and web services during the install.
(ii) You can perform a multi-tenant install by selecting the Options buttons. You will not perform a multi-tenant install in this class.

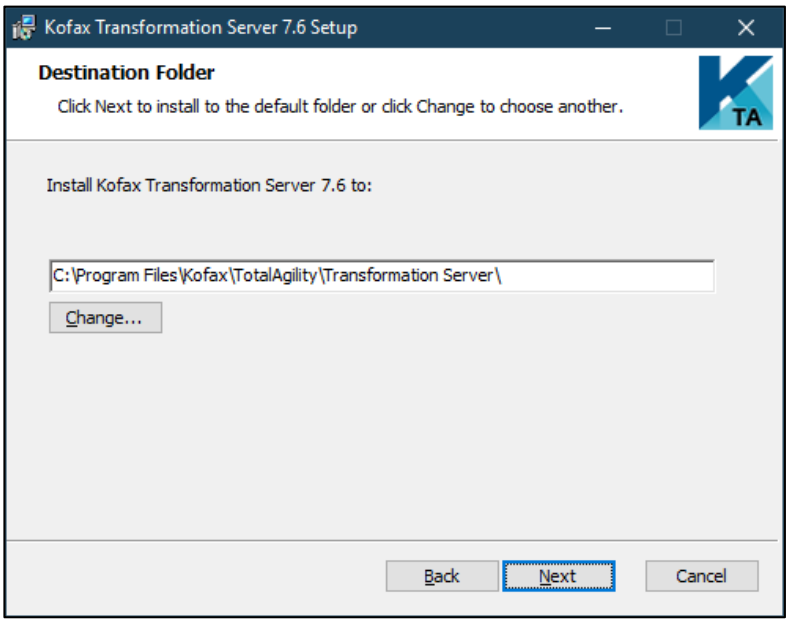
2. Click **Install**.

3. The **Kofax Transformation Server 7 Setup** screen appears:



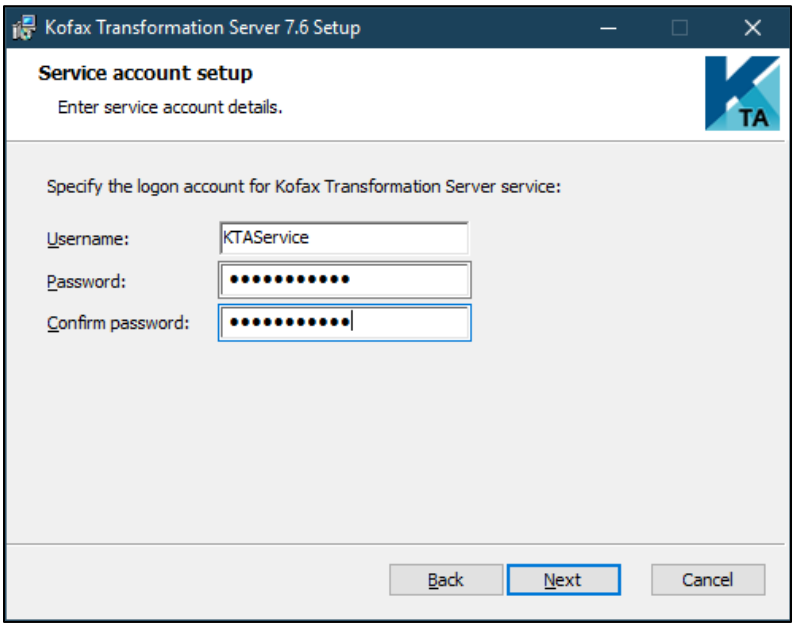
4. Click **Next**.

5. The **Destination Folder** screen appears.

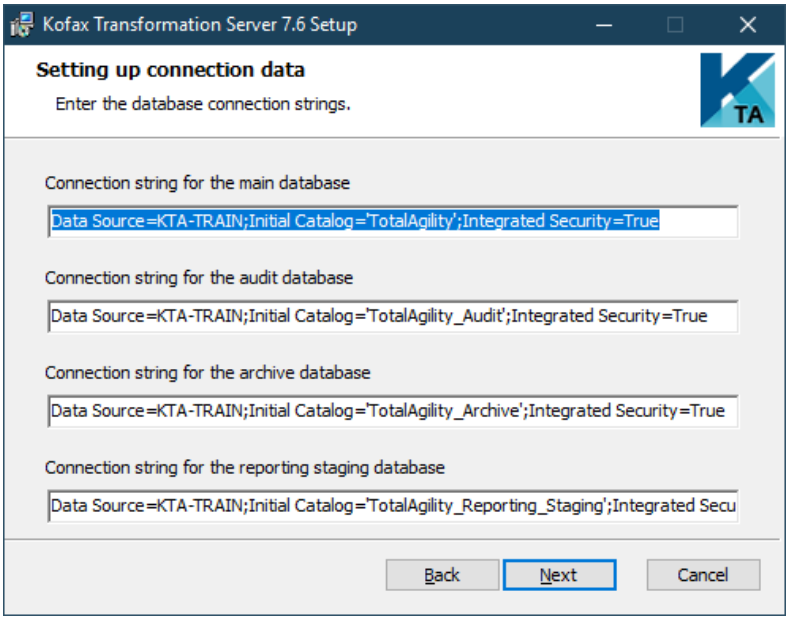


6. Click **Next** to install to the default folder or click **Change** to choose another.

7. On the **Service Account Setup** screen, enter the user name (KTAService) and password (W0rkstation) of the Windows account that will be used to run the Transformation server service.
   Note: When specifying a user name and password other than your Windows account, you must ensure that the account has the rights to logon as a service in your local security policy.

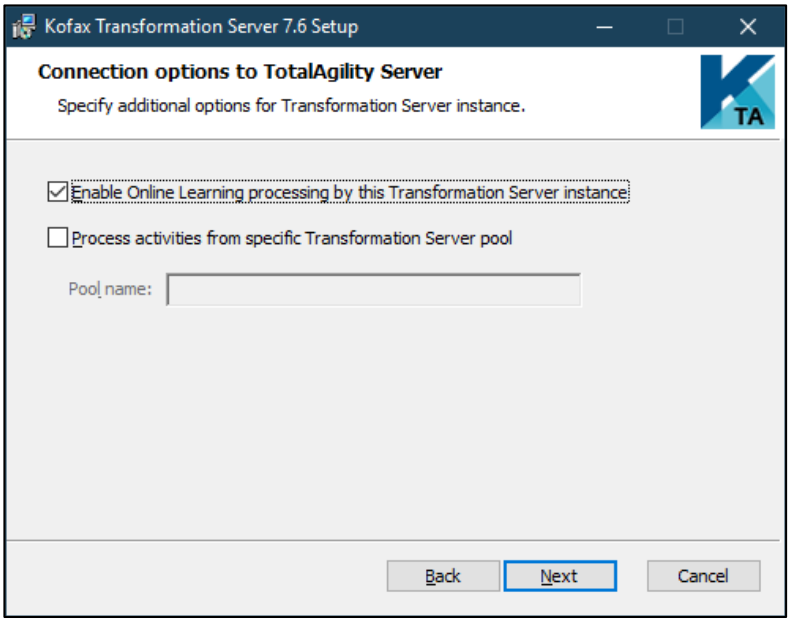


8. Click **Next**. The **Setting up connection data** screen appears.



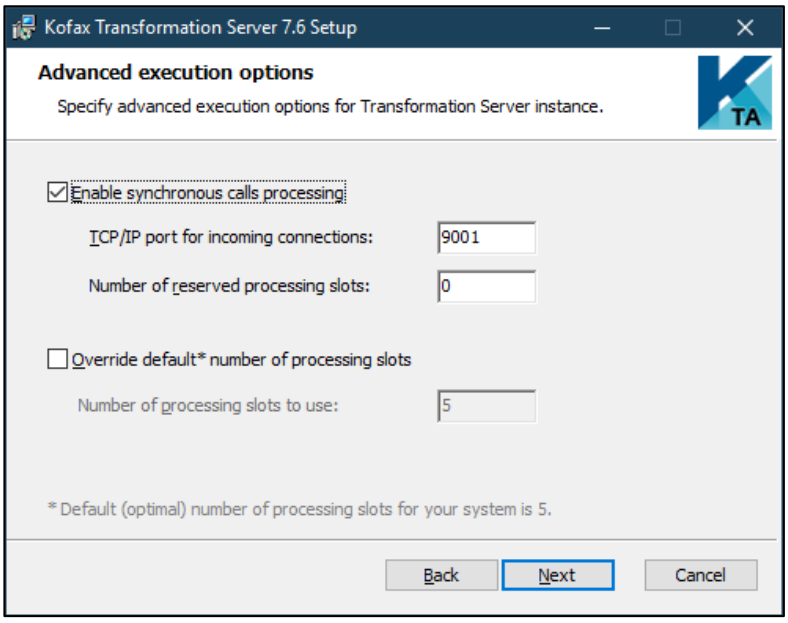
9. The connection strings are automatically retrieved. As we are installing everything on one server (as opposed to separate web, app, and database servers) these settings will only reflect a local environment.

10. Click **Next**. The **Connection options to TotalAgility Server** screen is displayed.



11. If in a multi Transformation server environment you can nominate one server to be the **Online Learning** server. We will leave this option checked in the training class (as we only have one server).

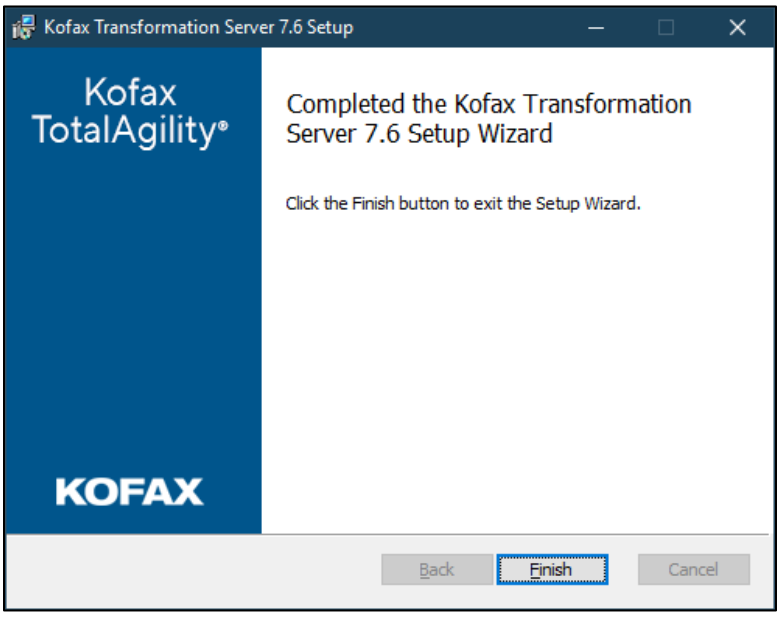
12. Click **Next**. The **Advanced execution options setup** screen appears.



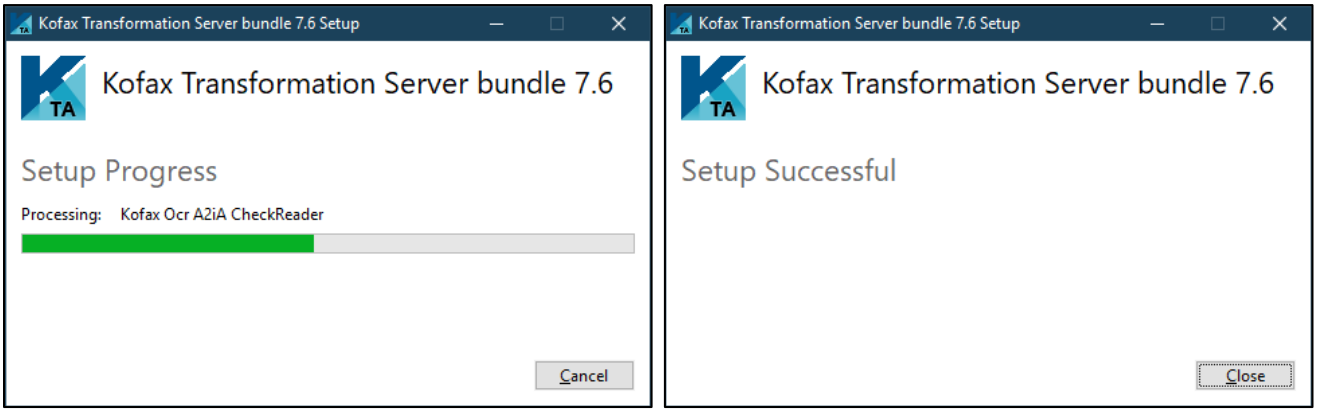
13. We will not configure any advanced options. Click **Next**.

14. Click **Next**. The **Ready to install Transformation Server** screen appears.

15. Click **Install**. The installation process will begin and after a few moments will complete.



16. Click **Finish**. The remaining part of the setup progresses.

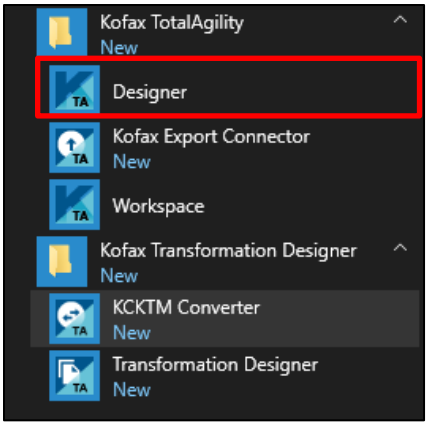


17. The **Kofax Transformation Server** installation is now **complete**.

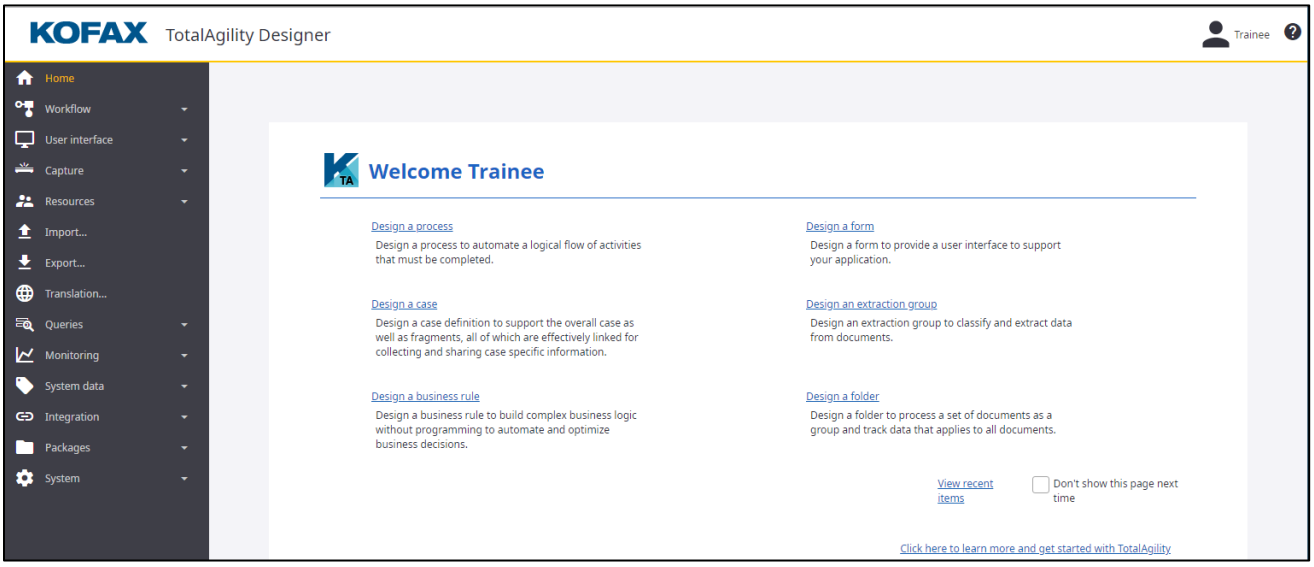
18. Click **Close**.

19. In order to test the basic functionality of the system you can start the **Kofax TotalAgility Designer**.

20. Click Windows **Start** button and locate the **Kofax** program group. Click on **Designer**.



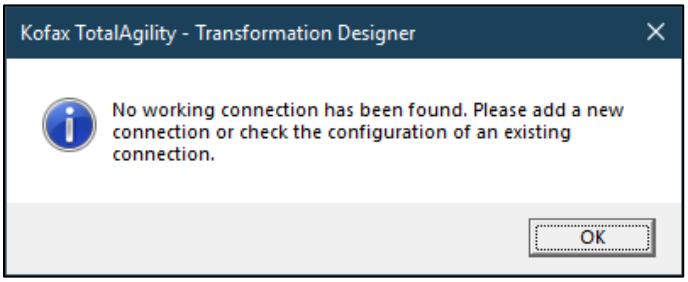
21. Alternatively, you can enter the http(s)://servername/TotalAgility/Designer in a browser, and note that the Designer appears to operate normally. You may wish to create a shortcut to the Designer on your browser toolbar.
Notes: (i) The Installer account becomes the default user in TotalAgility.
(ii) We recommend you run the Designer using Chrome or Edge. This course uses Chrome.

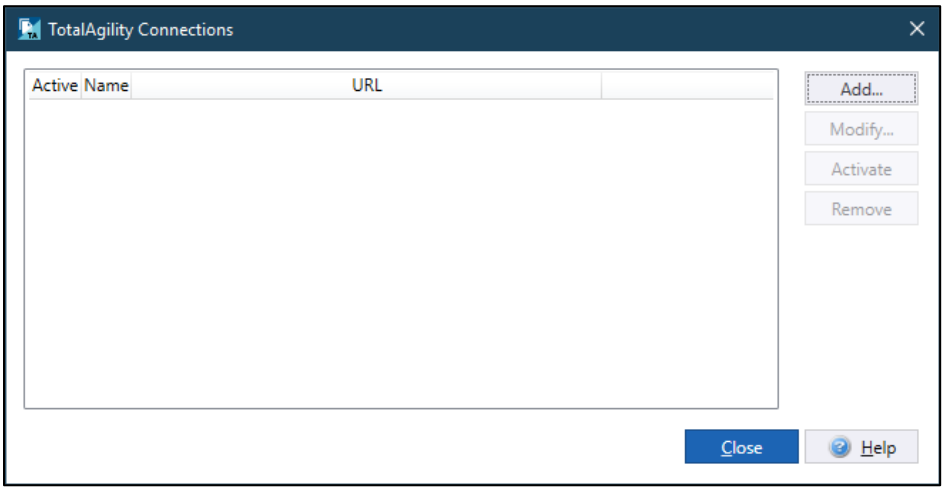


22. Perform the same kind of cursory test for the **Kofax Transformation Designer**.

23. Click **Start** and go to the **Kofax Transformation Designer** program group (you may wish to pin this app to the Windows Taskbar for convenience).

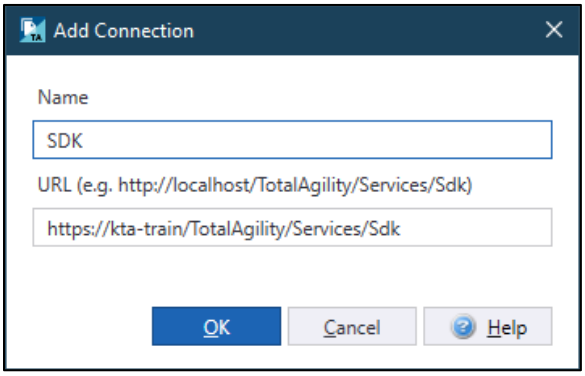
24. You will receive a message that no working connection has been found, click **OK**.





25. Click **Add…**

26. Enter **SDK** as the connection name, modify the **URL** accordingly, and click **OK**.



Note: You will need to modify the URL to use your server name and http(s) protocol on your own environment.

27. Click **OK** and click **Activate**.

28. Logout of both design environments.

Lab 02-6

Backing up Kofax TotalAgility 7 Databases

After you have installed Kofax TotalAgility, it would be advisable to back up each database before any content is added through the UI. In this example we will use SQL Server to back up the TotalAgility databases that were created in this installation. Note that you should also carry out a backup if you have modified any common server settings. Modifying common server settings is covered in Lab 2-10.

Important: For any further Kofax TotalAgility courses that you attend it is a *requirement* to restore the databases back to this initial state. Each course must be run on a fresh database environment. This is because the processes imported in each course are re-used and have the same underlying GUID, and potentially the same or higher version number. This is specific to the training environment, and would not cause any issues in a standard development/production environment. You cannot import a process onto a server where the process GUID is the same, and where the version of the imported process is the same or higher than the version that already exists on the server.

1. Open Start/ **Microsoft SQL Server Tools 2017/SQL Server Management Studio** or use the shortcut provided on the Windows Taskbar in the training environment.
2. Click on **Connect**.
3. Expand the **Database** folder.
4. Right click over the **TotalAgility** database and select **Tasks > Back Up…**
5. Click **OK**.
6. Repeat steps 4 and 5 for the **TotalAgility_Archive, TotalAgility_Audit, TotalAgility_Documents**, **TotalAgility_Reporting, TotalAgility_Reporting_Staging,** and **TotalAgility_Simulator** databases.
7. **Close** SQL Server Management Studio.

Lab 02-7

Transformation Server Polling Interval

By default the Transformation Server will poll every 30 seconds for work (if it is idle). In a training/demo environment you may find it useful to reduce this to 1 second.
WARNING: It is generally recommended that you do NOT change this setting on a Production environment.

Set Transformation Server Polling Interval

1. By default the **System > System settings > System tasks > Transformation Server Execution** setting is set at **Zero** (Days, Hours, Minutes), so the default setting of 30 seconds kicks in.

2. In a production system the above should be set to a suitable time frame for automated execution of Capture related activities.

3. However in a training/demo environment you can open the C:\Program Files\Kofax\TotalAgility\Transformation Server\Kofax.CEBPM.CPUServer.ServiceHost.exe.config file and add the following: **<add key="PollingTimeout" value="1"/>** under the **<appSettings>** element (the time interval is in seconds).

```
<appSettings>
  <!-- These settings are defined during installation. These should not be modified manually. -->
  <add key="IsMultitenantDeployment" value="false"/>
  <add key="MainDBConnectionString" value="Server=WIN-OD9AMN1128I;Trusted_Connection=Yes;Database=TotalAgility;"/>
  <add key="AuditDBConnectionString" value="Server=WIN-OD9AMN1128I;Trusted_Connection=Yes;Database=TotalAgility_Audit;"/>
  <add key="ArchiveDBConnectionString" value="Server=WIN-OD9AMN1128I;Trusted_Connection=Yes;Database=TotalAgility_Archive;
  <add key="ReportingStagingDBConnectionString" value="Server=WIN-OD9AMN1128I;Trusted_Connection=Yes;Database=TotalAgility
  <add key="TenantDBConnectionString" value=""/>
  <add key="DeploymentType" value=""/>
  <add key="StorageAccountConnectionString" value="UseDevelopmentStorage=true"/>
  <add key="SdkServicesLocation" value=""/>
  <add key="CoreServicesLocation" value=""/>
  <add key="SimulatorDBConnectionString" value=""/>
  <add key="ProcessIntelligenceDBConnectionString" value=""/>
  <add key="IsSingleRoleDeployment" value="false"/>
  <add key="ClientSettingsProvider.ServiceUri" value=""/>
  <add key="IsAzure" value="false"/>
  <add key="CoreWorkerWorkQueueSize" value="50"/>
  <add key="DatabaseRetryCount" value="5"/>
  <add key="MinBackOffInMilliseconds" value="1000"/>
  <add key="MaxBackOffInMilliseconds" value="30000"/>
  <add key="DeltaBackOffInMilliseconds" value="10000"/>
  <add key="OPMTCacheRetryCount" value="3"/>
  <add key="MaximumNumberOfActivitiesToLock" value="1"/>

  <!-- This key determines how long a capture activity may be in the taken state before it should be reset due to crashed
  <add key="TakenActivitiesResetTimeoutInMinutes" value="120"/>
  <!-- This key determines how often activities are checked for running too long (in combination with above setting) -->
  <add key="ResetActivitiesIntervalMinutes" value="10"/>

  <!-- This key is used for RTTS deployments; if the value is set to true, then no regular activities will be taken by thi
  <add key="SynchronousOnlyProcessing" value="false"/>
  <add key="PollingTimeout" value="1"/>
```

Notes: (i) Before you edit any configuration file you are advised to create a copy of the file. (ii) Open the file using Notepad ++ (right click over the file and select Edit with Notepad++). (iii) When you click Save you will be prompted to launch Notepad++ in Administrator mode. Click Yes twice.

4. If you use Notepad, you will need to run Notepad as an Administrator if you need to make a change to the config file.

Lab 02-8

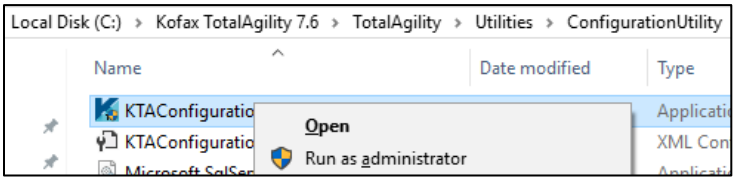
Post Installation Notes

1. After installation has completed you can log into the Designer, Transformation Designer, and Workspace using the **Installer** account. The **installer** account can be used to create additional users and update membership of groups via the **Resources** menu.
2. If a user requires access to the **Designer/Transformation Designer**, the user can be made a member of the built in **Designers** group using the **Resources** menu.
3. After installation the **Service** account runs the **TotalAgilityAppPool** in IIS.

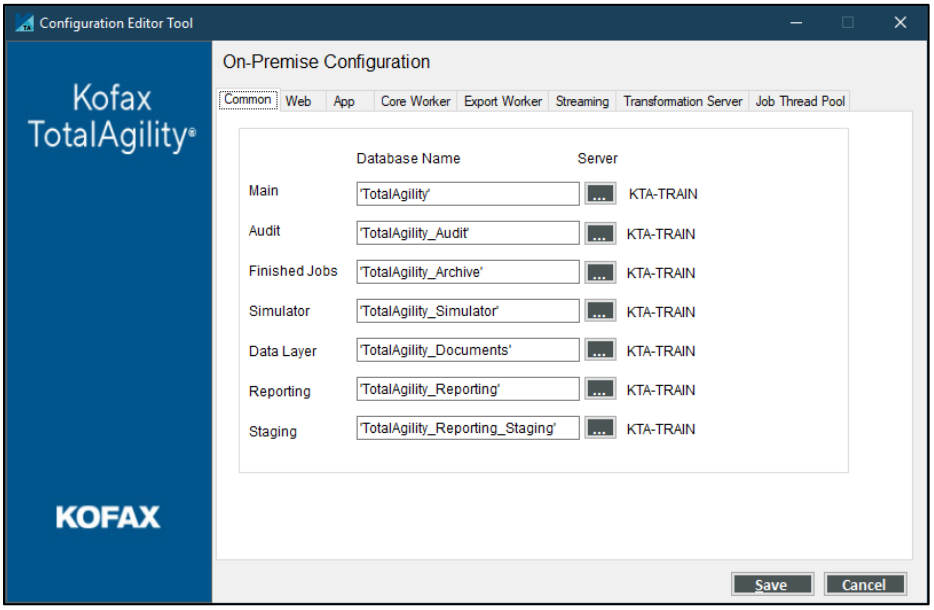
Configuration Editor Utility

During setup you configured various settings during the wizard. Some of these settings can be changed post installation. This can be achieved either by editing various configuration files or more preferably by using the Configuration Editor Utility.

4. Navigate to C:\Kofax TotalAgility 7.6\TotalAgility\Utilities\ConfigurationUtility
5. Right click over **KTAConfigurationUtility.exe** and select **Run as administrator**.



6. Click **No** when asked to run in **Docker** mode, and click **No** when asked to stop the services.
7. Notice that there are various tabs that allow you to configure various settings.



Warning: You should generally not make configuration changes to most settings unless advised to by Kofax Support Teams, Kofax Professional Services, or Kofax Partners.
Note: You can change the Authentication protocol and use of SSL post installation.

In this lab you will learn how to login to the TotalAgility Designer and navigate around it. You will also learn how to set common Server Settings, create a simple capture workflow business process, save, release, lock, unlock a process, and how to categorize the process.

Lab 02-9

Login to the Designer

Azure Cloud Based

As part of the agreement with Kofax, a new instance of TotalAgility is created. An email is sent to you detailing your login credentials to both the TotalAgility Designer and Workspace. We will look at the Workspace in later labs.

1. From your email, click the link to the TotalAgility Designer.

On Premise

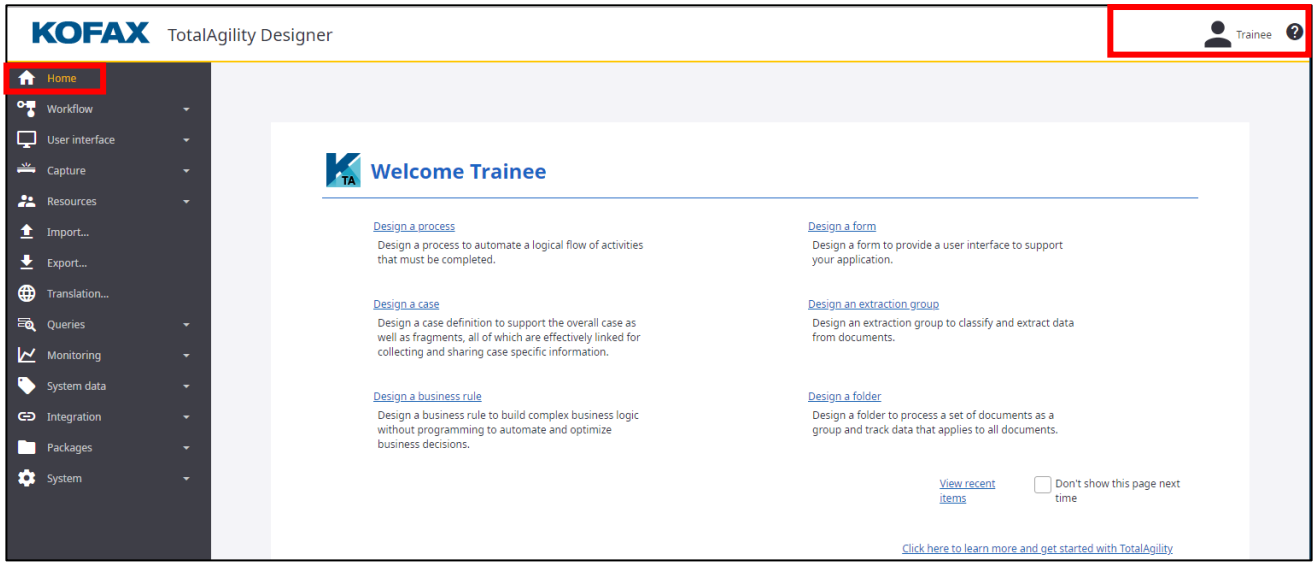
During the install of Kofax TotalAgility a Windows user account and password is specified.

2. Either launch the Designer/Workspace from the **Kofax TotalAgility** program group or open **Chrome** and manually enter the URL's as shown below.
3. To access the Designer enter http(s)://servername/TotalAgility/Designer
4. To access the TotalAgility Workspace enter http(s)://servername/TotalAgility/Forms
5. Enter your username and password (this will not be needed if the system is using Windows Authentication). You should be presented with the Home Page with a list of available Modules.

Kofax Training Image

6. Either launch the Designer/Workspace from the **Kofax TotalAgility** program group or open **Chrome** and manually enter the URL's as shown below.
7. To access the Designer enter https://kta-train/TotalAgility/Designer
8. To access the TotalAgility Workspace enter https://kta-train/TotalAgility/Forms

9. The **Designer Home** page is displayed:



10. You logon details are displayed at the top right corner of the Designer.

11. You can logout by clicking the user name and selecting the **Logout** option.

IMPORTANT NOTE:

To save time you should create a shortcut to the Designer and Workspace in your browser using the Bookmarks toolbar.

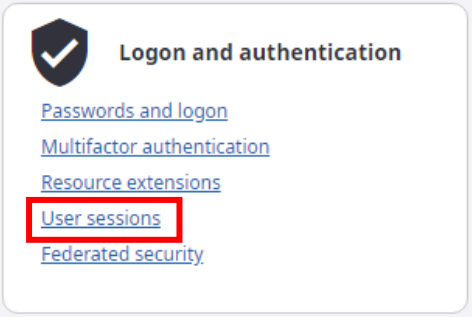
Lab 02-10

Configure Common Server Settings

User Sessions

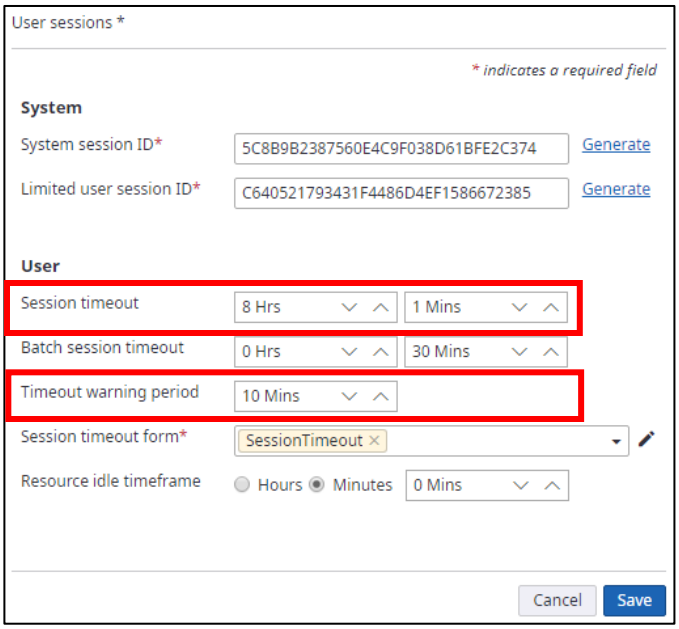
In this part, you will learn how to configure user sessions.

1. From the **Main** menu navigate to **System** > **System settings**, and from the **Logon and authentication** card, click **User sessions**.



2. Set **Session timeout** to 8 hours.

3. Set **Timeout warning period** to **10 minutes**. This means that you will receive a timeout warning at 7:50 if session timeout is 8 hours. Also note that you should also set the **Process Session Timeouts** system task in the **System Settings** module. The default is to check for timeouts every hour. If a timeout does occur the user is redirected to the **SessionTimeout** form. This form can be customized.

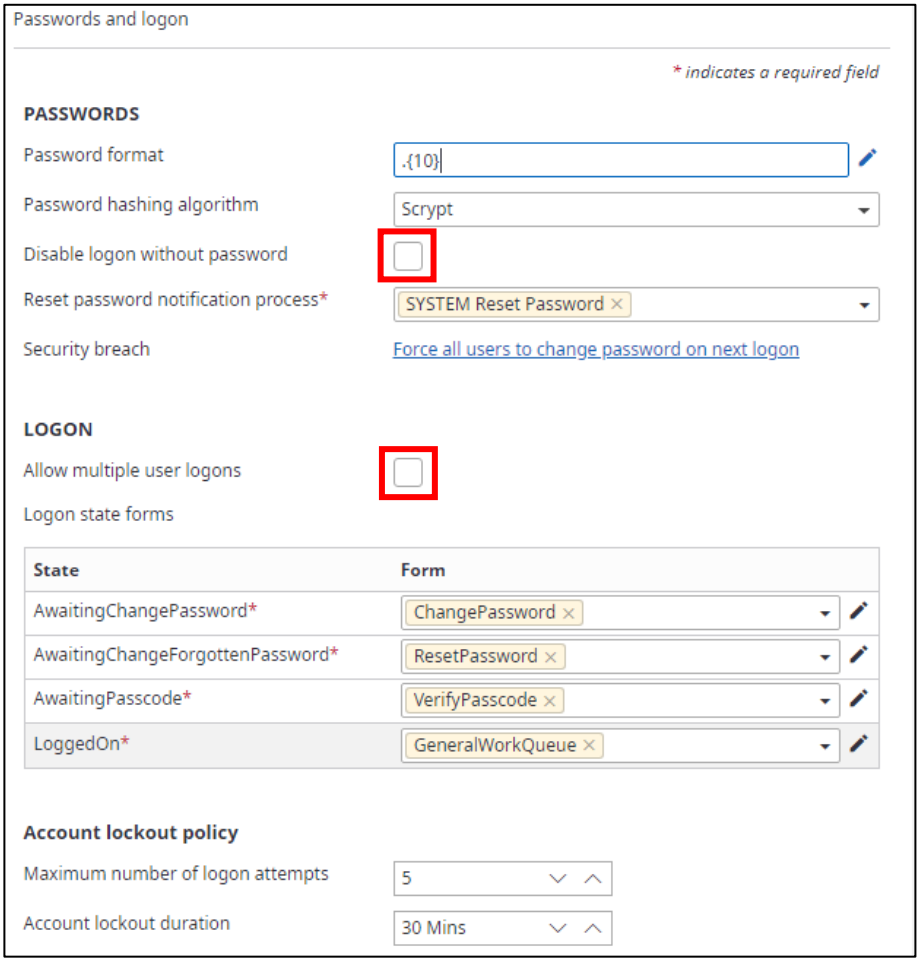


4. Click **Save**.

Passwords and Logon

In this part, you will learn how to configure passwords and logons.

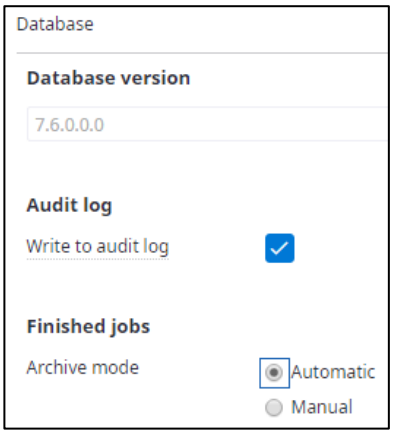
5. From the **Main** menu navigate to **System** > **System settings**, and from the **Logon and authentication** card, click **Passwords and logon**.
6. By default **Disable logon without password** is checked (this prevents users from logging on without a password). Uncheck this option to allow logon without a password (for training).
7. By default **Allow multiple user logons** is unchecked. You will not change this setting.



Database Settings

In this part, you will learn how to configure database settings.

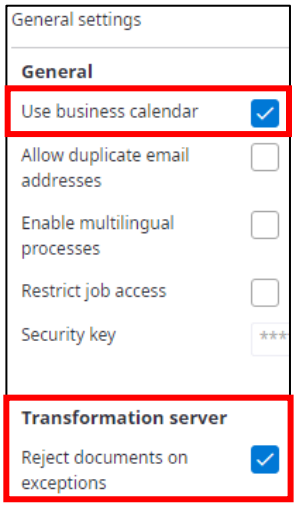
8. From the **Main** menu navigate to **System** > **System settings**, and from the **Database, retention and reporting** card, click **Database settings**.
9. By default **Write to audit log** is checked
10. By default **Archive mode** (of finished jobs) is set to **Automatic**. If you have finished jobs that have not previously been archived, you can use the **Manual** option.



General Settings

In this part, you will learn how to configure general server settings.

11. From the **Main** menu navigate to **System** > **System settings**, and from the **System** card, click **General**.
12. Check the **Reject documents on exceptions** checkbox. If a document is corrupt or the Transformation Server cannot process it, you can get TotalAgility to mark the documents as rejected rather than suspend the job.
13. By default **Use business calendar** is unchecked. Check the option to use a business calendar.



14. Click **Save**.

SLA and Work Assignment

In this part you, will turn off server level Skill Levels as we will not use this feature in the Essentials course.

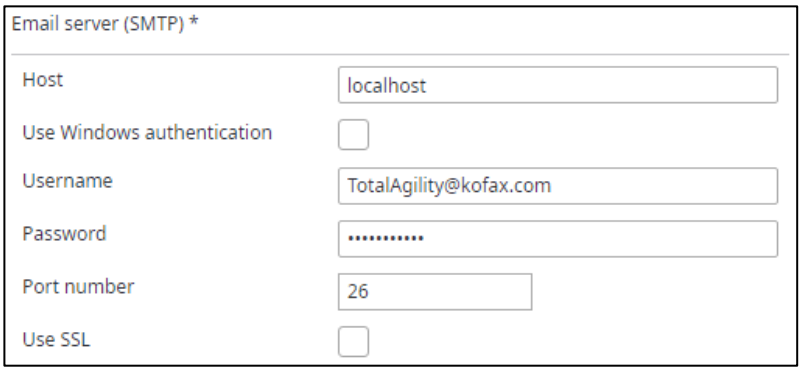
15. From the **Main** menu navigate to **System** > **System settings**, and from the **Process** card, click **SLA and work assignment**.

16. From the **Skill level** dropdown, select **Not used**, and click **Save**.

Configure Email Settings

In this part you will add the details of an SMTP server that is already installed on your training machine. The SMTP server settings are used when TotalAgility sends an email either through the Activity Notification feature or the Email node. Both these options will be covered in a later lab.

17. From the **Main** menu navigate to **System** > **System settings**, and from the **System** card, click **Email server (SMTP)**. Configure the settings as follows:

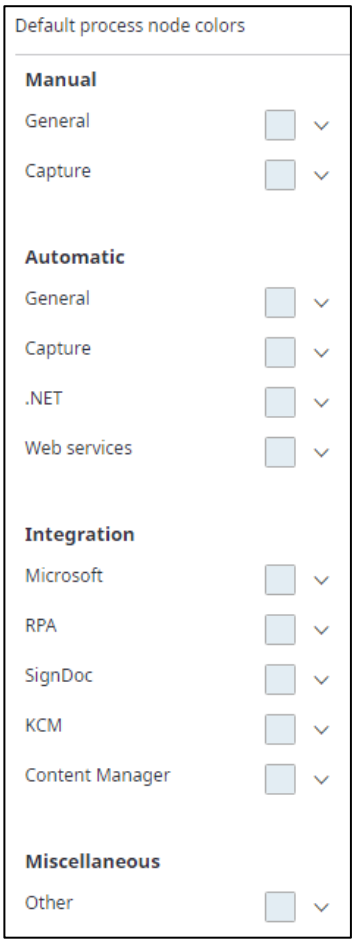


Note: The password is W0rkstation.

Configure Node Colors

In this part, you will examine but not change node colors. The color of the nodes is determined in server settings, and could be useful to help you quickly identify a nodes type from its color.

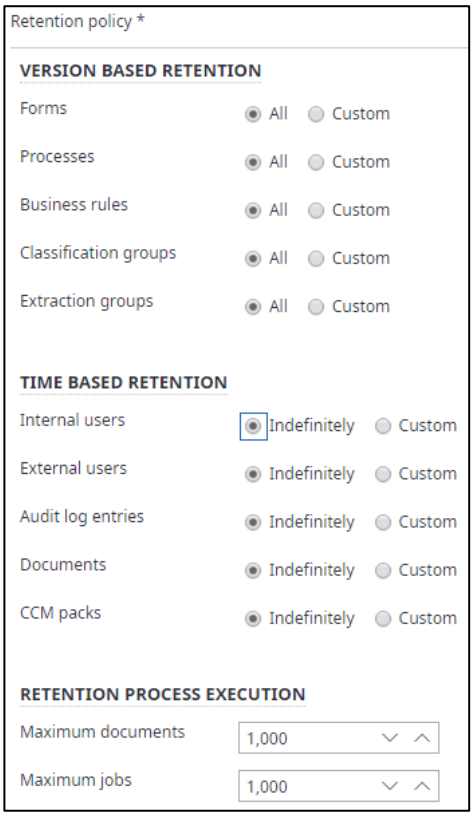
18. From the **Main** menu navigate to **System** > **System settings**, and from the **Process** card, click **Process node colors**. Note the default color assigned to each node type:



Retention Policy

In this part, you will examine, but not change the Retention Policy. The retention policy defines how long you wish to keep the different objects you create.

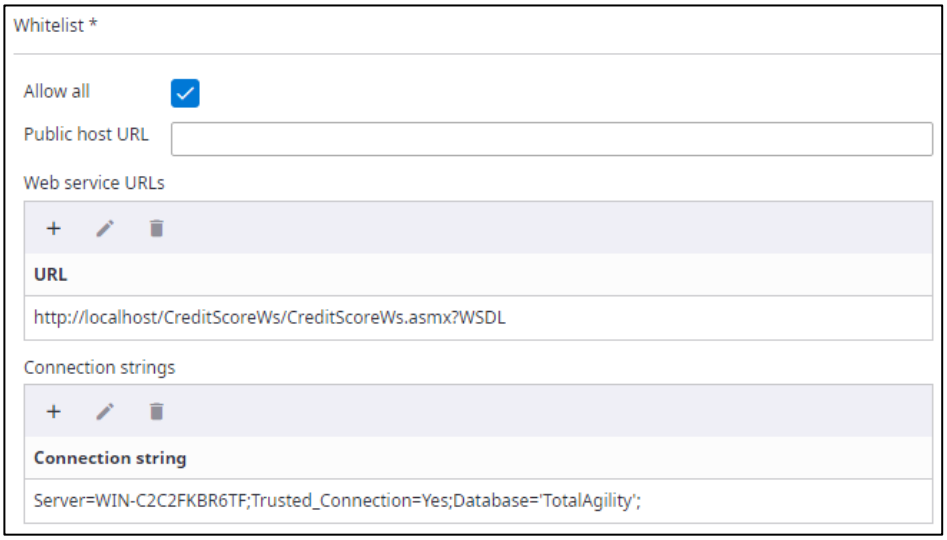
19. From the **Main** menu navigate to **System** > **System settings**, and from the **Database, retention, and reporting** card, click **Retention Policy**. Notice that all objects will be retained indefinitely on a new installation. You may wish to consider whether you wish to implement a retention policy on your own system.
    Note: You can also set a retention policy on jobs. This concept is covered in the Kofax Total Agility Administration course.



Whitelist

In this part you will examine, but not change the Whitelist. The whitelist allows Administrators to secure URL's and/or Connection Strings by preventing connections to any arbitrary hosts or ports.

20. From the **Main** menu navigate to **System** > **System settings**, and from the **System** card, click **Whitelist**.

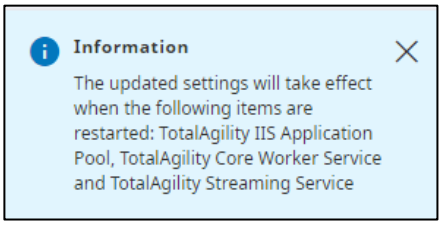


Save Server Settings

After you have made changes to the server settings, you must restart some services and the app pool for the server settings to become effective.

Restart Services

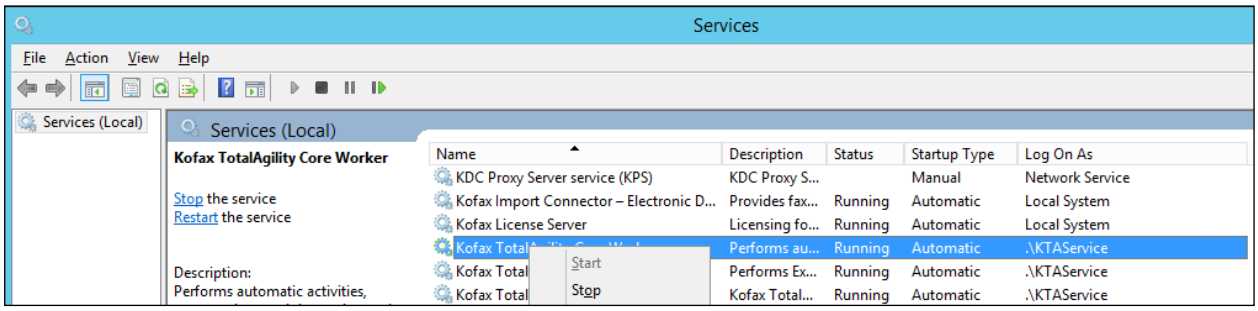
21. The **TotalAgility Core Worker Service, Streaming Service,** and the **TotalAgility IIS Application Pool** need to be restarted.



22. From the Start Menu click **Windows Administrative Tools** and click **Services**.

23. Locate the **Kofax TotalAgility Core Worker Service**, right-click and select **Restart**.

24. Locate the **Kofax TotalAgility Streaming Service**, right-click and select **Restart**.

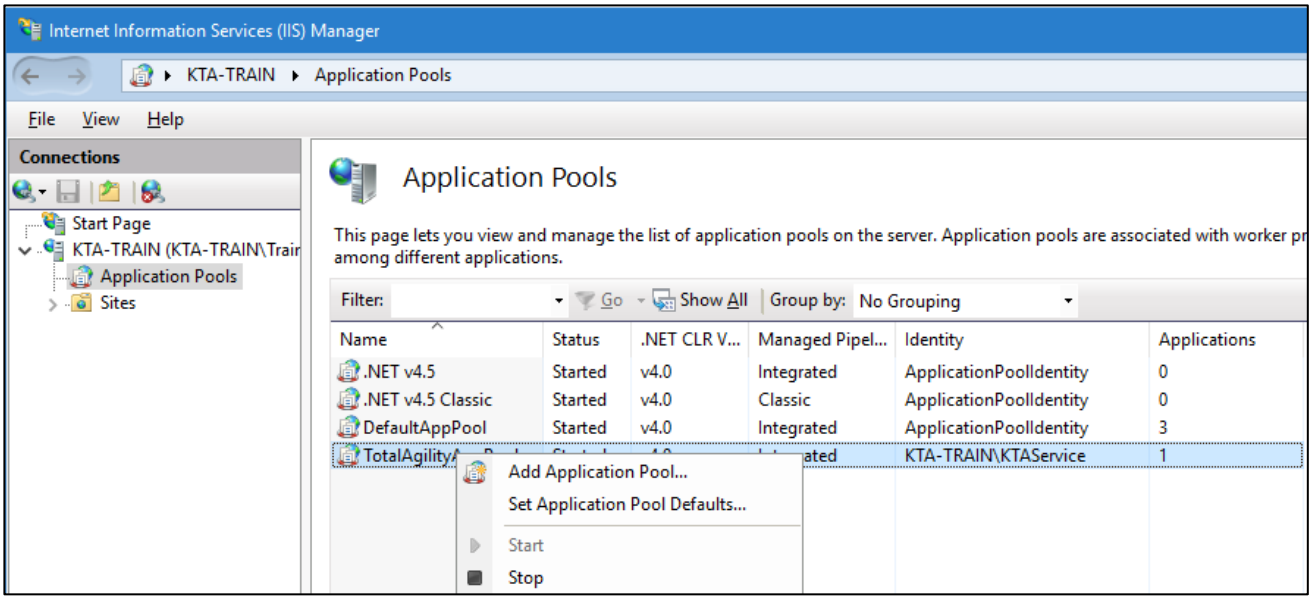


Restart the TotalAgility IIS Application Pool

25. From the **Start** Menu click **Internet Information Services (IIS) Manager**.

26. Expand the Machine name and select **Application Pools**. Locate the **TotalAgilityAppPool**, right-click and select **Stop**.

27. Right-click again and select **Start** (you may have to wait a few seconds before restarting).



28. **Close** the **Internet Information Services (IIS) Manager** window.

Backup TotalAgility Databases

As you have changed server settings, you may wish to back up the TotalAgility SQL databases.

29. Refer to Lab 02-6.

Lab Notes

Install with Manual Database Creation

You can manually create databases, use the installation wizard, or use a silent install to create the databases only. In this section, databases are manually created in SQL server.

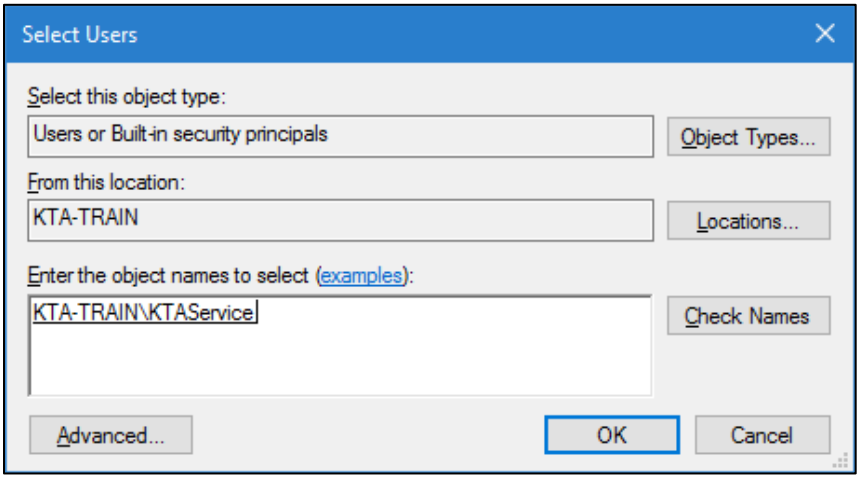
1. Right-click on Databases and click New **Database**. Create the following databases:
   TotalAgility
   TotalAgility_Archive
   TotalAgility_Audit
   TotalAgility_Documents
   TotalAgility_Reporting
   TotalAgility_Reporting_Staging
   TotalAgility_Simulator

   Note: (i) You can choose to create additional databases for TotalAgility_Audit and Archive (Finished Jobs).
   (ii)The Trainee account is the database owner.

Add the Service Account as a Local Administrator

The service account requires access to the filing system of the server during the installation.

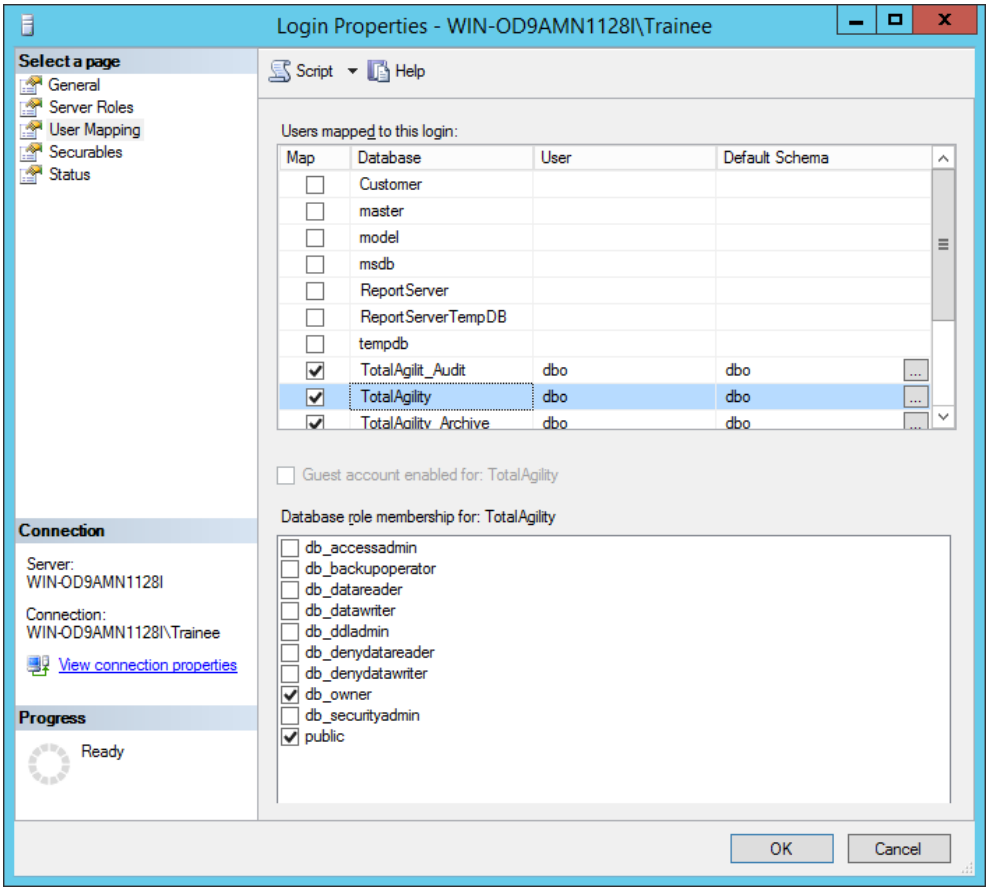
2. Click on Start/Windows Administrative Tools/**Computer Management**.
3. Select **Local Users and Groups**.
4. Double click the **Administrators** group.
5. Click **Add**.
6. Enter **KTAService** and click **Check Names**.



7. Click **OK** twice.

Add the Service Account as an SQL Login and Set Service Account SQL Permissions

8. Open Start/Apps/**Microsoft SQL Server 2017/SQL Server Management Studio** or use the shortcut provided on the taskbar in the training environment.
9. Select **SQL Server Management Studio**.
10. Click on **Connect**.
11. Expand the **Security** folder, and expand the **Logins** folder.
12. **Right-click** over the **Logins** folder and select **New Login...**
13. Locate the **KTAService** account using the **Search** button.
14. Select **Windows Authentication**.
15. Click **OK**.
16. After an installation the **KTAService** account is assigned the **db_owner** database role. After installation the DBA can *remove* the db_owner database role and give the **minimum** privileges for the service account: **read/write/execute**.



17. To **summarise**, you can manually create the database and run the SQL installation database scripts to create the tables. The table scripts can be found in the installation media in a folder called DatabaseScripts. After installation the service account will require the minimum permissions: read/write/execute.

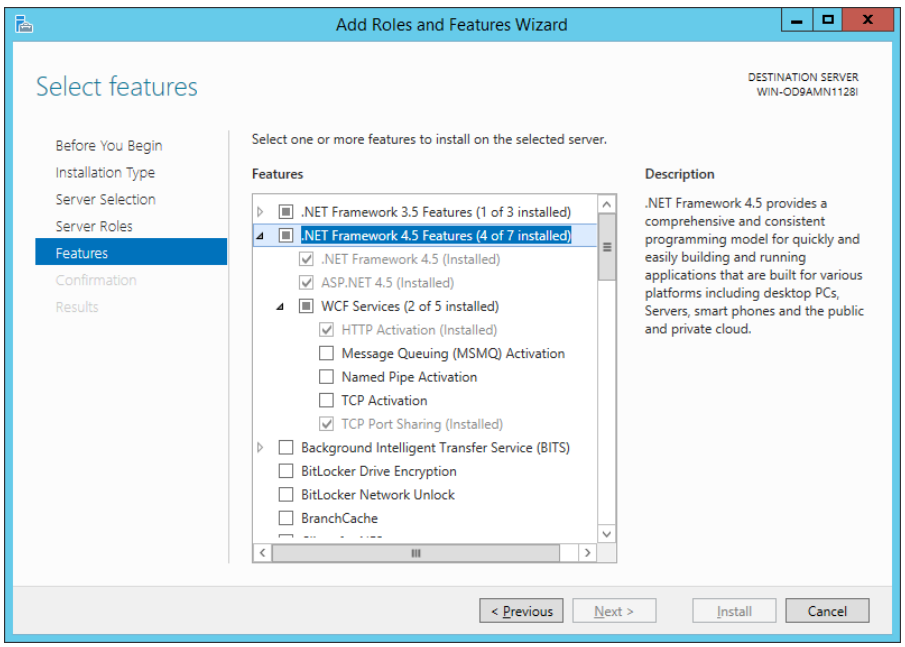
Add the Installer Account as an SQL Login and Set Installer Account SQL Permissions

18. The **Trainee** account is the installer account. This account has already been added as a SQL login in the training environment.
19. Expand the **Security** folder in **SQL Management Studio**.
20. Double click on the **Trainee** account.
21. Click on **User Mapping**.
22. Select each **TotalAgility** database and assign the **db_owner** database role (so the databases can be initialized e.g. with tables).
23. Click **OK**.
24. Click on **File/Exit** to exit SQL Server Management Studio.

Prerequisites for Kofax TotalAgility 7

.NET 4.7 and above

The .NET 4.7 framework may already be installed on a server operating system. You can install the .NET framework using the web installer here:
https://www.microsoft.com/en-us/download/details.aspx?id=55170
The following .NET framework features are enabled on the Windows Server using Server Manager:



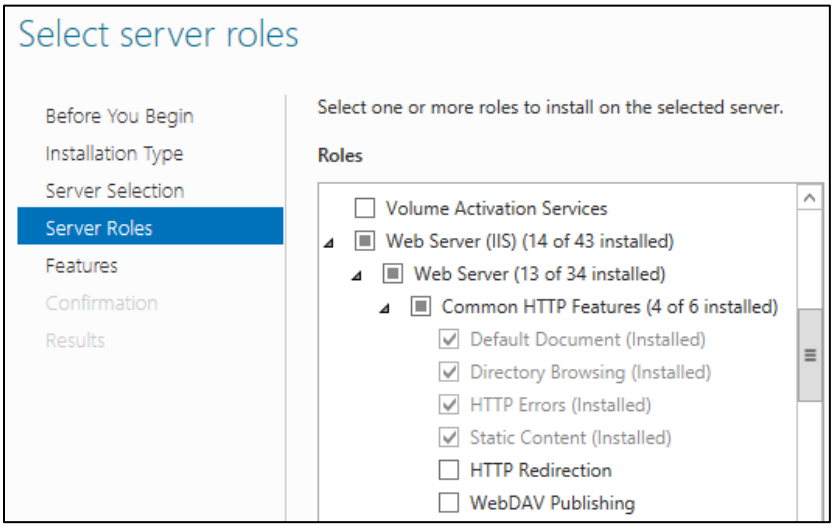
Browser Requirements

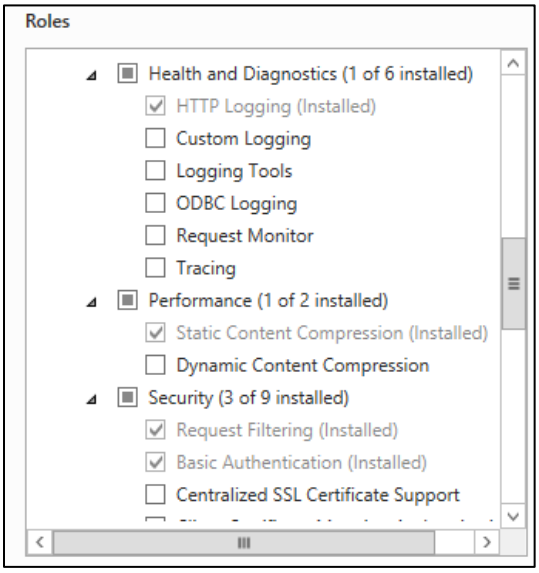
The Designer can run in any HTLM5 compatible browser.
The Workspace will run in any HTML5 compatible browser.

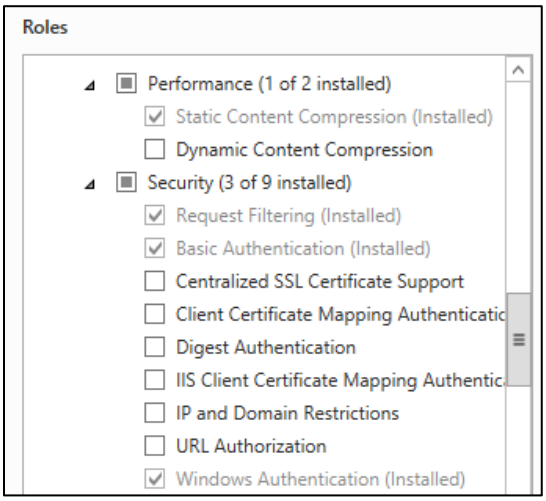
IIS 10.0

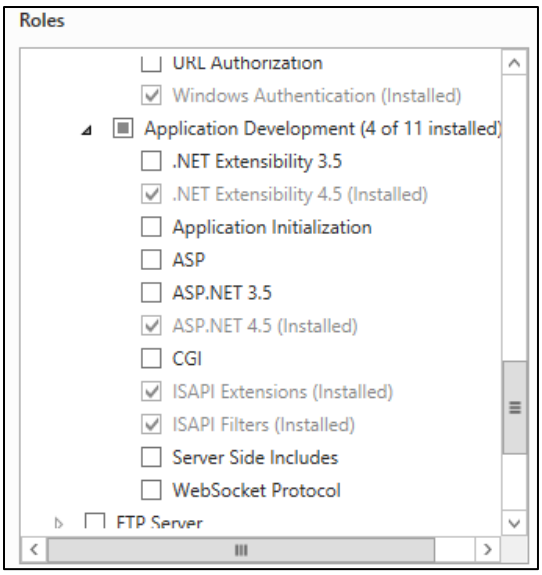
The simplest way to install and configure IIS is to use Server Manager:

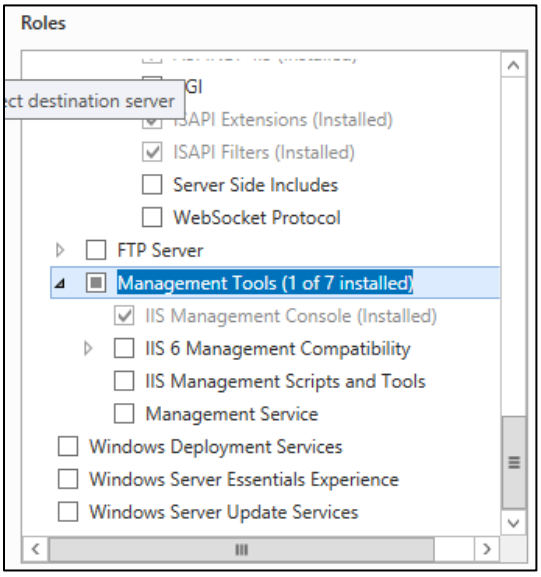
1. Open **Server Manager**
2. Click **Roles** in the navigation tree
3. If “Web Server (IIS)” is not listed, click **Add Roles**
4. Add the “Web Server (IIS)” Role. Below is a list of screenshots of the selected web server components:

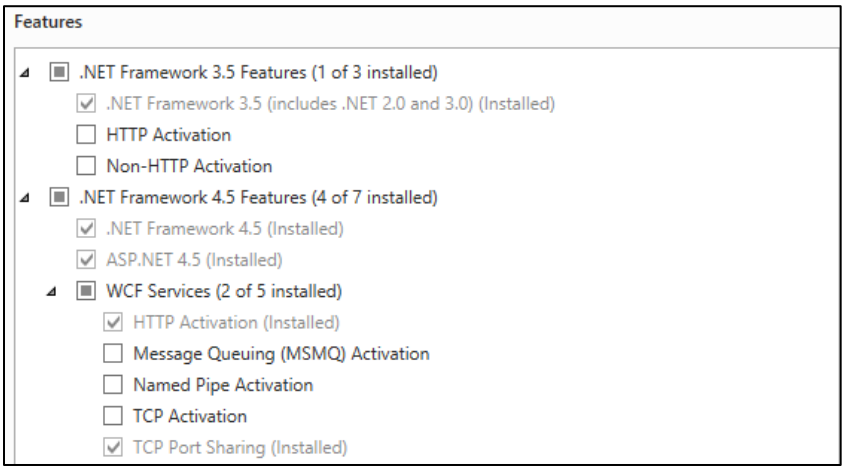



Roles
Health and Diagnostics (1 of 6 installed)
HTTP Logging (Installed)
Custom Logging
Logging Tools
ODBC Logging
Request Monitor
Tracing
Performance (1 of 2 installed)
Static Content Compression (Installed)
Dynamic Content Compression
Security (3 of 9 installed)
Request Filtering (Installed)
Basic Authentication (Installed)
Centralized SSL Certificate Support

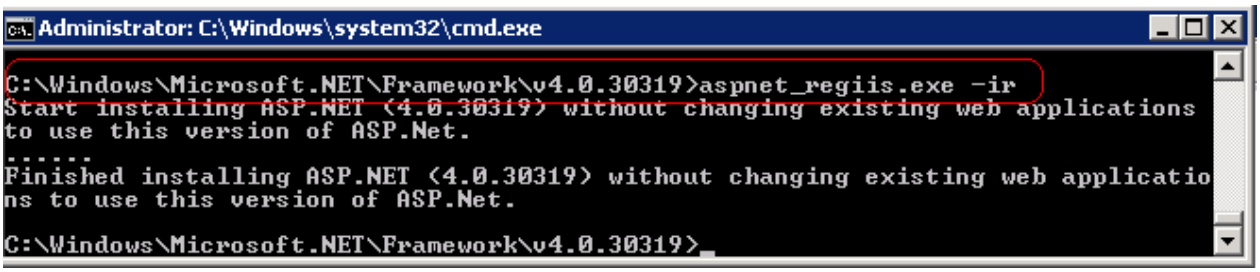

Roles
Performance (1 of 2 installed)
Static Content Compression (Installed)
Dynamic Content Compression
Security (3 of 9 installed)
Request Filtering (Installed)
Basic Authentication (Installed)
Centralized SSL Certificate Support
Client Certificate Mapping Authenticatic
Digest Authentication
IIS Client Certificate Mapping Authentic
IP and Domain Restrictions
URL Authorization
Windows Authentication (Installed)


Roles
URL Authorization
Windows Authentication (Installed)
Application Development (4 of 11 installed)
.NET Extensibility 3.5
.NET Extensibility 4.5 (Installed)
Application Initialization
ASP
ASP.NET 3.5
ASP.NET 4.5 (Installed)
CGI
ISAPI Extensions (Installed)
ISAPI Filters (Installed)
Server Side Includes
WebSocket Protocol
FTP Server





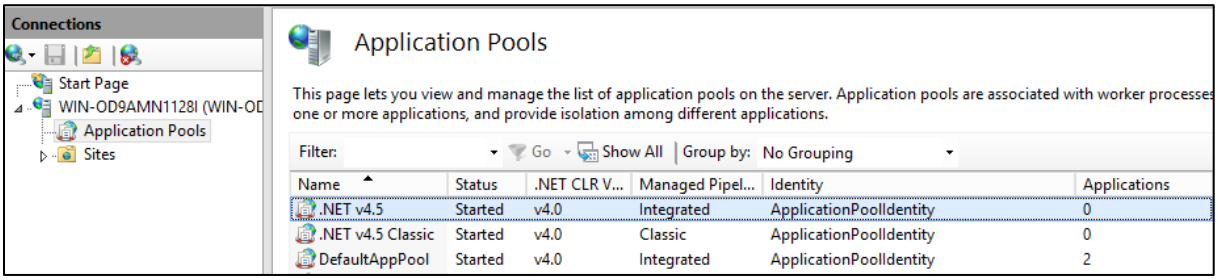
Important: You *may* still need to register ASP.NET with IIS using the following command line.
Run from: **%WINDIR%\Microsoft.NET\Framework64\v4.0.30319**):
aspnet_regiis.exe –ir



Additional details can be found at:
http://msdn.microsoft.com/en-us/library/k6h9cz8h(v=vs.100).aspx

To validate the last step, check that you have ASP.NET v4.0 application pools as shown

below:



SSL (Secure Sockets Layer)

You can choose to install TotalAgility as an SSL application in IIS. This is recommended, but is not mandatory. If you choose to use the SSL protocol, you will need to generate/obtain a certificate. You can create a self-signed certificate in IIS for training purposes. If you are not familiar with SSL and certificates, you can install TotalAgility without SSL.

SQL Server

Install SQL Server 2017 and set the Authentication mode. In training, Windows Authentication is used.

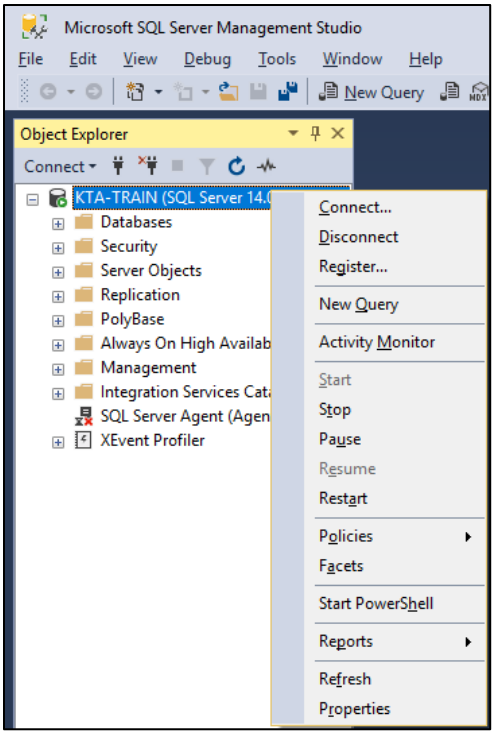
Important Notes:

(i) SQL Command Utilities are required.
(ii) SQL Server Native Client is required.
(iii) SQL Express is **not** officially supported.

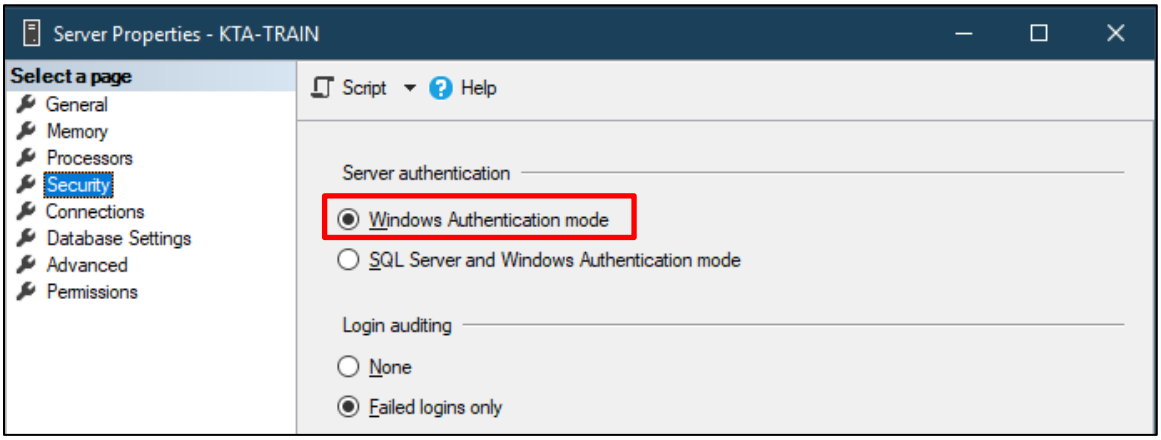
Enable Windows and SQL Server Authentication mode

1. Open **SQL Server Management Studio**.
2. Right-click server and select **Properties**

3. Select **Security**.



4. Select **Windows Authentication mode**.

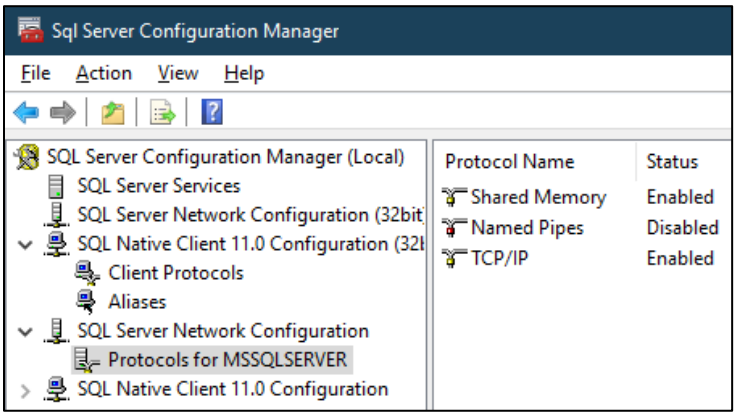


5. Click **OK** and **close** SQL Server Management Studio.

Enable SQL Server Network Access

This is required to access the database from different machines.

1. Open **Start/Apps/SQL Server Configuration Manager**
2. Under **SQL Server Network Configuration**, enable **TCP/IP** protocol as shown on screenshot below:



Install Hotfixes/Service Packs

After you have installed Kofax TotalAgility, check to see if there are hotfixes/service packs available for download from the Kofax website.

1. Open http://services.kofax.com/support/products/totalagility/7.6/downloads.php
2. **Download** the latest service pack or hotfix.
3. Unzip the service pack or hotfix.
4. **Navigate** to e.g.:
   C:\Kofax TotalAgility 7.6\TotalAgility7.6.0.1\TotalAgility\TotalAgilityInstall
5. Right click over **Setup.exe** and select **Run as administrator**.
6. Navigate through the steps of the wizard, installing all components.
7. After installation has completed, **backup** up the Kofax TotalAgility databases.

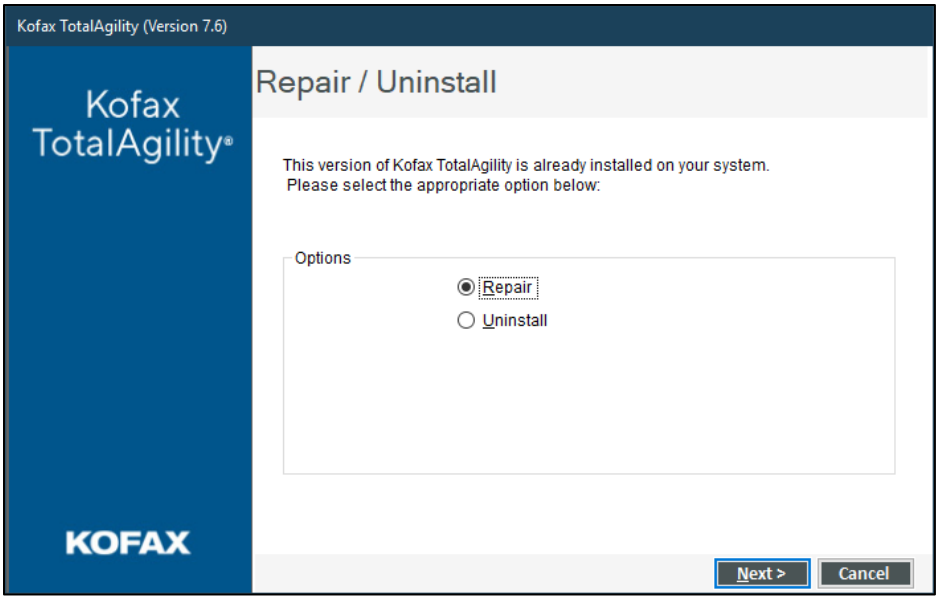
Repair Kofax TotalAgility

You can repair TotalAgility Components by following the steps outlined below.

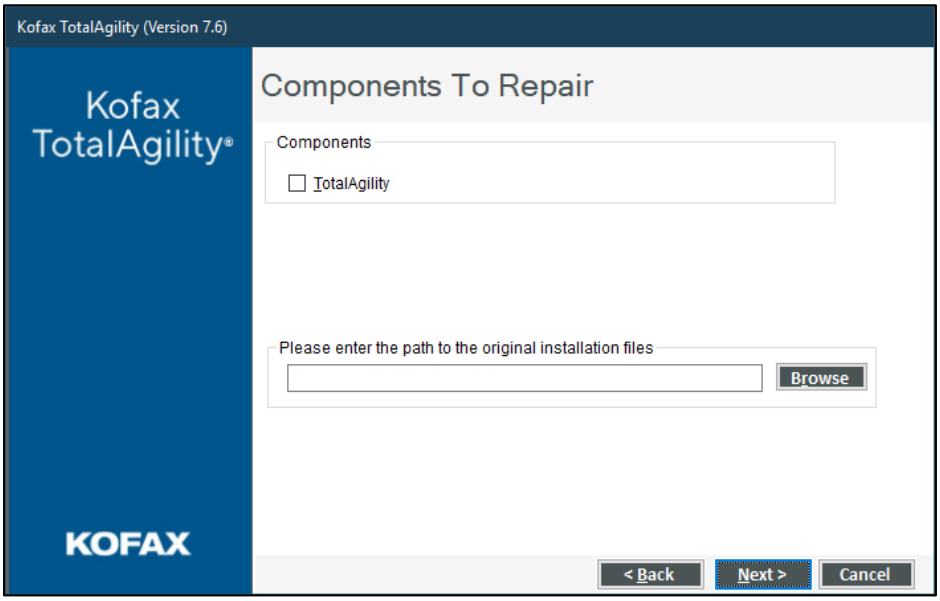
Repair Kofax TotalAgility

1. Go to **Start > Control Panel > Uninstall a program**.

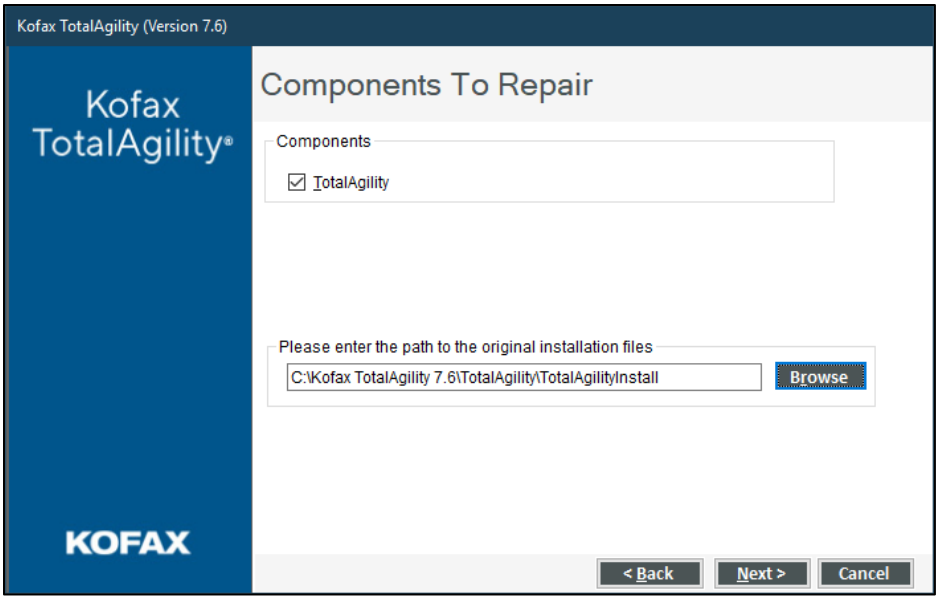
2. Select **Kofax TotalAgility** and select **Uninstall/Change**.



3. Click **Repair** to repair TotalAgility and click **Next**.

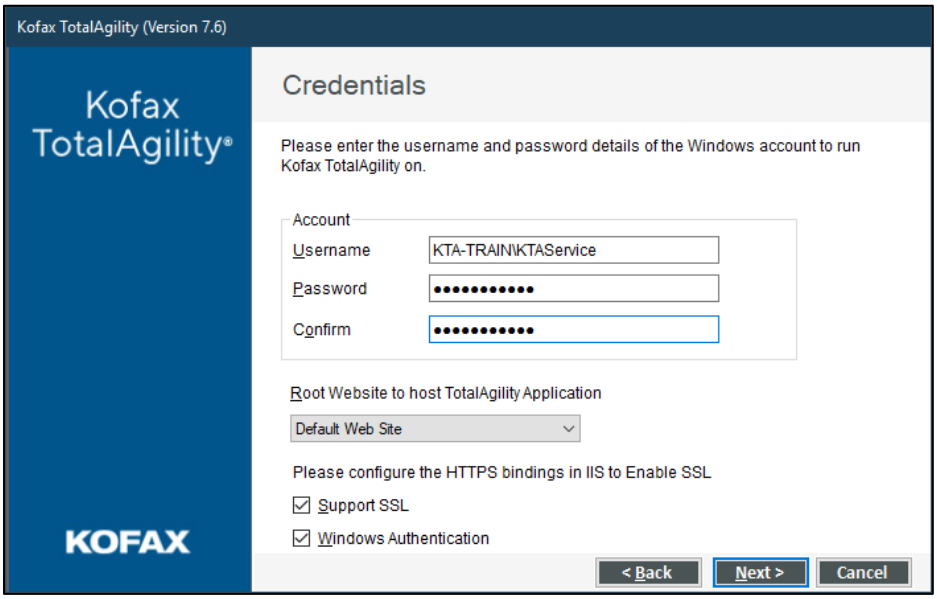


4. Select **Components** and click **Browse**. Browse to the original installation files:

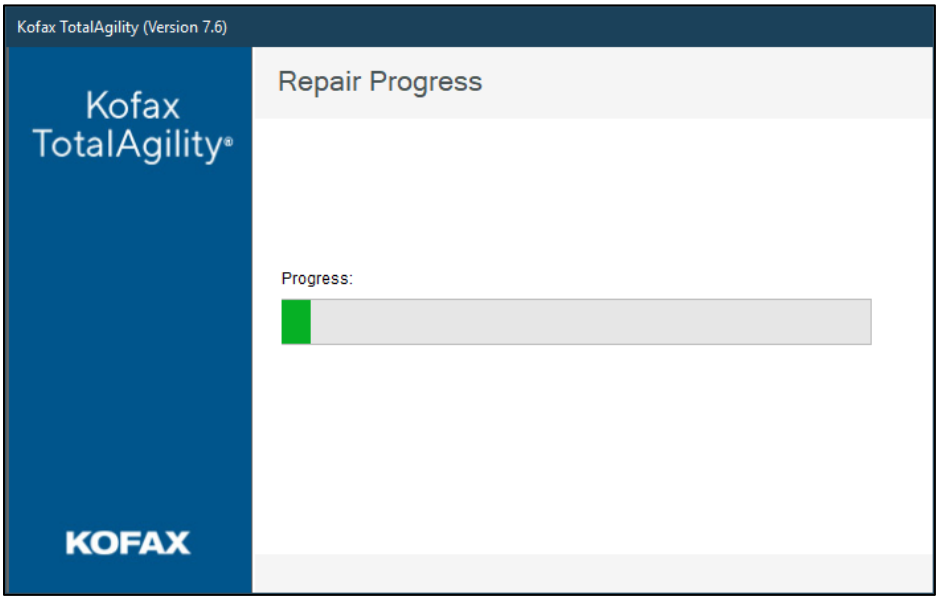


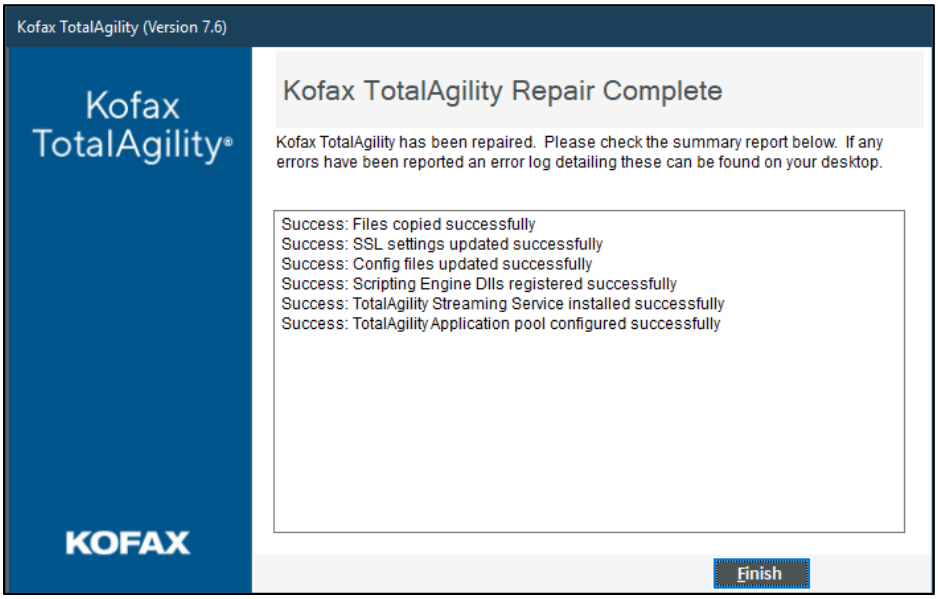
5. Click **Next**.

6. Enter the **Service account** credentials:



7. Click **Next**.





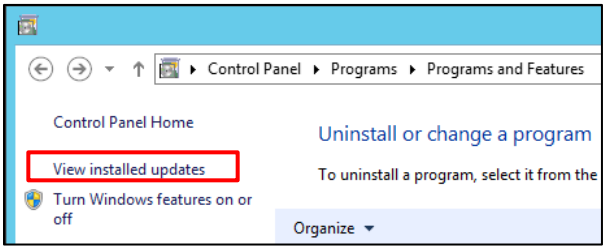
8. Click **Finish**.

Remove a Service Pack/Hot Fix

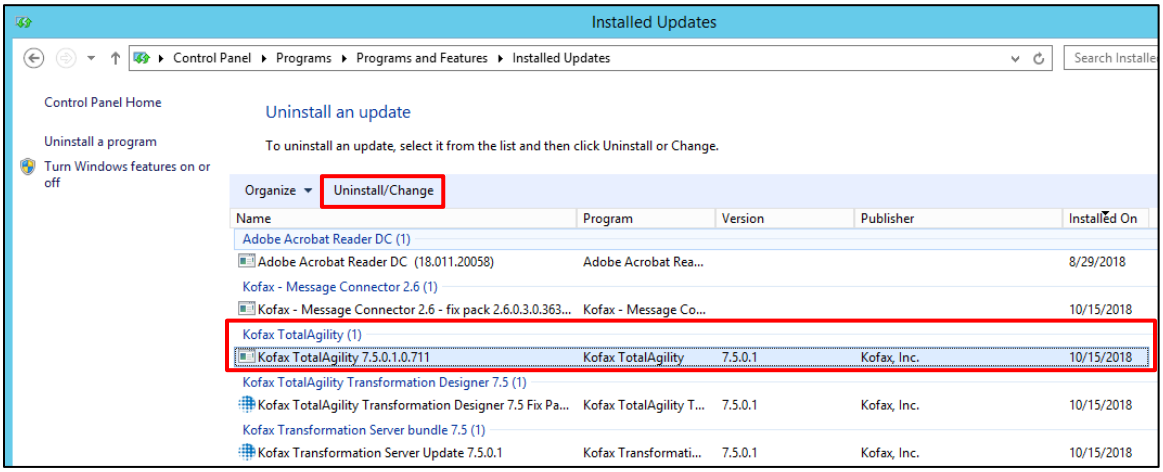
You can remove an installed service pack/hotfix and roll back to the previous version. **Important Note:** If you uninstall a service pack/hotfix, you should restore a backup of the previous version of TotalAgility after the service pack/hotfix has been removed.

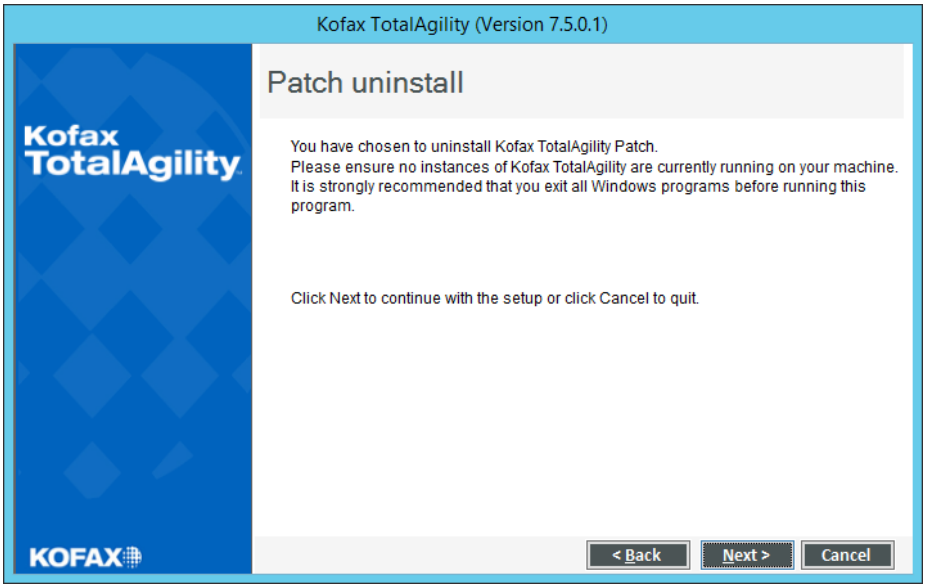
Uninstall a Service Pack

1. Go to **Start > Control Panel > Uninstall a program**.
2. Select **View installed updates**.



3. Select **Kofax TotalAgility 7.6.0.1** and select **Uninstall/Change**.





4. Click **Next** and **Finish**.

5. **Restore** the previous SQL database backup.
   Note: You should stop all services and the app pool prior to a database restore.

Revision Questions

1. What is the minimum memory requirement for TotalAgility 7.6?

   _____

2. What is the minimum disk space required for a TotalAgility 7.6 installation?

   _____

3. What is the minimum server operating system requirement for TotalAgility 7.6?

   _____

4. What is the minimum SQL server version requirement for TotalAgility 7.6?

   _____

5. Which programming framework is the TotalAgility 7.6 product based on?

   _____

6. Can you uninstall a hotfix or service pack?

   _____

7. Which utility can be used to check if installation pre-requisites have been met?

   _____

8. Are the Transformation server components typically installed on a separate server?

   _____

9. Can you access the TotalAgility Designer from an HTML5 compatible web browser anywhere in the world where you have designer access permissions, the URL of the designer, and internet connectivity to the server?

   _____