

TECHNICAL TRAINING LAB INSTRUCTIONS

In this lab you will learn how to configure the Capture Applications process to automatically create one Loan application process for every Application form.

Lab 15-1

Loop through Documents in a Folder

Add Variables

In this lab, you will create 4 new variables. 3 of the variables will be used in a loop activity which will be used to iterate through each document in the folder that is passed into the capture process. You will create a new instance of the loan application process for each document that is found in the Applications folder. A case reference variable will be created to store the case reference for each new Loan Application case.

1. From the **Main** menu navigate to **Workflow > Business processes**, and open the **Capture Applications** process.
2. From the **Ribbon**, select the **Variables** tab, and add the following 4 new variables:

Name	ID	Type	Value	Initialization
Application Document	APPLICATION_DOCUMENT	Document	Personal Loans	
Applications Folder	APPLICATIONS_FOLDER	Folder	Applications	✓
Case Reference	CASE_REFERENCE	String		
Document Found	DOCUMENT_FOUND	Bool	false	
Start Index Documents	START_INDEX_DOCUMENTS	Long	1	

Notes: (i) The **Applications Folder** variable was created in an earlier lab.

(ii) The **Application Document** variable is of **Type=Document**, and the default value is set to a **Document Type** called **Personal Loans** (expand the Loan Applications extraction group).

(iii) Ensure the **Start Index Documents** variable has a value of 1.

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

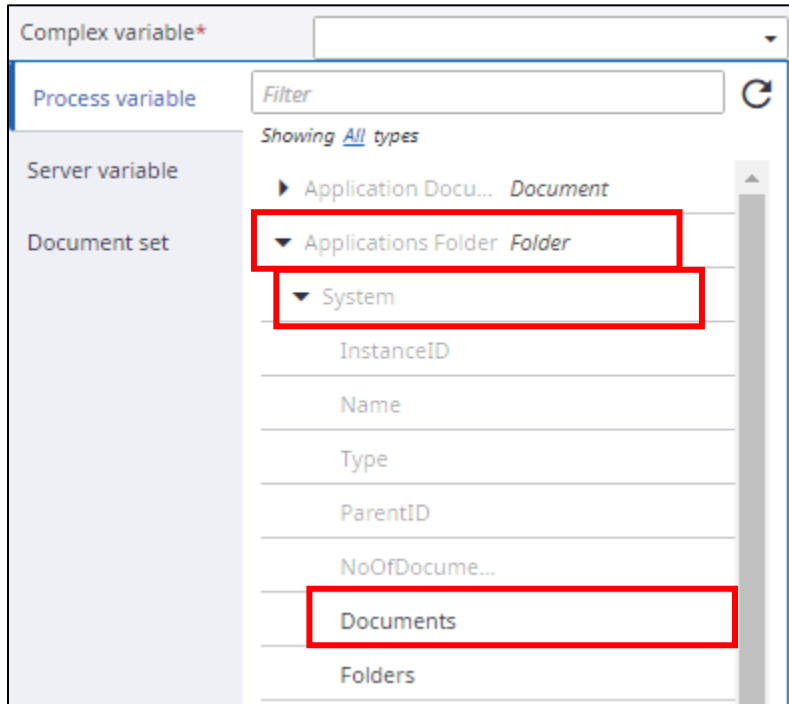
Configure the Loop Activity

The loop activity can be used to process a group of folders/documents (list or array). In this example for each row (folder) in the array, we will pass the individual document into a new process that will handle an individual application (the Loan Application process). The loop activity starts at the first row (with an index of 1). If a row is found, the updated index is incremented by 1 and the second row in the array can be processed the next time around the loop.

4. Delete the **End** point, and add an **Ordinary** activity after the **Validation** step.
5. Enter **Loop Applications** as the activity name.
6. In the **Properties** panel, from the **Type** dropdown, select **Loop**.

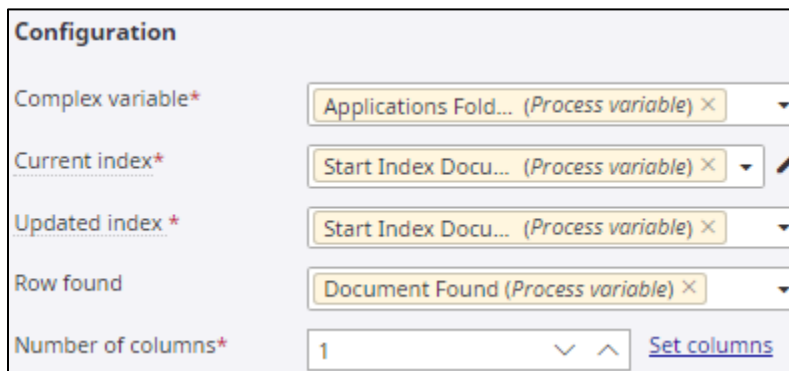
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- In the **Configuration** area, from the **Complex variable** dropdown, select **Applications Folder > System > Documents**.



Note: Notice how only suitable variables are listed (Document or Folder), and only suitable fields are selectable (Documents or Folders).

- Set the other values as follows:



Notes:

- As the process is leaving the loop, the start index is incremented by 1, meaning the next time back into the loop, the next row of data is obtained.
- This Boolean (true/false) variable will be set to true if a document is found in the row and will be set to false if a document is not found in the row. The variable will be analysed in a Decision activity later in the process.

- Enter **1** as the **Number of columns** and click the **Set columns** link.
- Select **Application Document** as the value for **Column1**. The finished configuration should be as follows:

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Note: A reference to the first document (Column1) in the Applications Folder array will be stored in a document variable called **Application Document**. We can then pass this reference to the document to a new process, which will be responsible for processing the individual Loan Application.

11. **Save** the process (ignore any warnings).

Test a Variable Value in a Decision Activity

In this part, you will test the value of the Document Found variable in a decision activity.

12. Add a **Decision** activity after the **Loop Applications** activity and rename the activity to **Application Found**.

13. From the **Properties** panel, right-click in the **Condition text**, and from the **Variable** list select **Document Found**.

14. Add an **End** point to the **Application Found** decision activity.

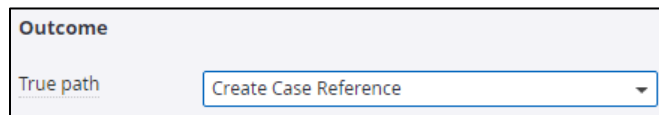
15. Add an Ordinary activity to the **Application Found** decision activity, and set the name of the activity to **Create Case Reference**.

16. Add an Ordinary activity to the **Create Case Reference** activity and set the name of the activity to **Loan Application Process**.

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17. Select the **Application Found** decision activity.

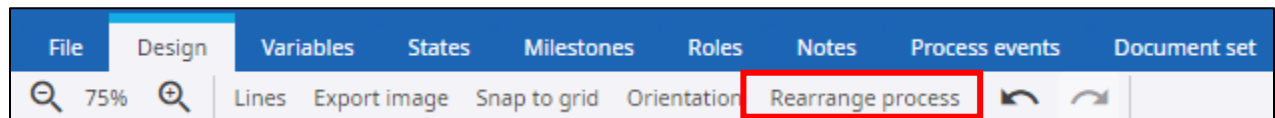
18. From the **Properties** panel, from the **True path** dropdown, select **Create Case Reference**.



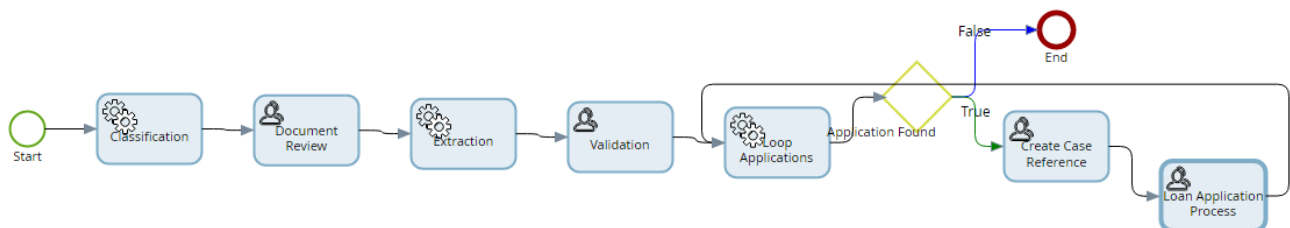
19. Select the **Loan Application Process** activity.

20. Select the **Arrow** icon from the Satellite activities, hold the mouse down and drag the cursor to the **Loop Applications** activity (the connector should loop back to the Loan Applications Process activity).

21. From the **Design** tab, click **Rearrange process**.



22. Your process should look like:



23. **Save** the process.

Expression Activity

You can use an Expression activity to set the value of one or more variables using free text, variables, operators, and functions. We will use the Expression activity to concatenate the first and last name of the Applicant and pass the result into the Case Reference variable.

24. Select the **Create Case Reference** activity, and from the **Type** dropdown, select **Expression**.

25. From the **Properties** panel, in the **Configuration** area, click the **+** icon.

26. From the **Target variable** dropdown, select **Case Reference** (process variable).

27. In the **Expression** window, **right click** and configure as shown:

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Expression

Right click on rule editor to select item

Application Docu... (Process variable) × + Application Docu... (Process variable) ×

Note: You need to right click, select **Application Document > Customer > First Name**, then add a + symbol. Repeat to add the **Last Name**. The Application Document variable contains all the fields in the Document Type **Personal Loans** as we connected this variable to the Document type on creation.

28. Click **Add**.

29. **Save** the process.

Create New Job Activity

The Create New Job (CNJ) activity is an automatic activity that starts a new instance of a process. The main process carries on independently of the new process that it instantiated.

30. Select the **Loan Application Process** activity.

31. From the **Properties** panel, from the **Type** dropdown, select **Create new job**.

Note: This activity is part of the loop so as each new document is found a new instance of the downstream **Loan Application** case is created.

32. From the **Properties** panel, from the **Job type** dropdown, select **Create new case**.

33. From the **Case Reference** dropdown, select **Case Reference** (process variable).

34. From the **Process** dropdown, select **Loan Application**.

35. Map the fields as follows:

Initialization variables		
Name	Type	Value
Customer...	Long	
First Name	String	Application Docu... (Process variable) ×
Last Name	String	Application Docu... (Process variable) ×
Loan Am...	Currency	Application Docu... (Process variable) ×
Loan Appl...	String	Application Docu... (Process variable) ×

36. Notice that there are five variables listed for the **Loan Application** process. These are Initialization variables in the Loan Application process.

Notes: (i) In the above example the **Case Reference** variable is holding the Customer Name, as populated from the **Expression** activity.

(ii) The **First Name** and **Last Name** can be found in the **Customer** data grouping and the **Loan Amount** can be found in the **Application** data grouping in the **Application Document**

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variable. You do not need to map the **Customer Id** field.

(iii) The **InstanceID** can be found by clicking on the **Application Document** variable and selecting **System**.

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

Same As Previous

Previously, the Post Forms activity in the Loan Application process was configured to use the resource setting: Same As Previous (Job Creator). Because the system is now configured to create an instance of the Loan Application process (downstream process), we must assign the Post Forms activity to the Admin group of users.

38. From the **Main** menu navigate to **Workflow > Case definitions**, and open the **Loan Application** process.

39. **Select** the **Post Forms** activity, and from the **Properties** panel, select the **Resource assignment** tab.

40. From the **Type** dropdown, select **Resourcing**, click **Add**, and add the **Admin** group (XYZ Bank category).

The screenshot shows a configuration window titled "Activity - post forms". Inside, there is a section labeled "Activity assignment". Under this section, there is a checkbox labeled "Allocate manually" which is currently unchecked. Below that is a dropdown menu labeled "Type" which is set to "Resourcing". At the bottom of the "Activity assignment" section is a list box labeled "Resources" which contains the entry "Admin (Group)". To the right of the "Resources" list box is a blue button labeled "Add".

41. Click **Done**.

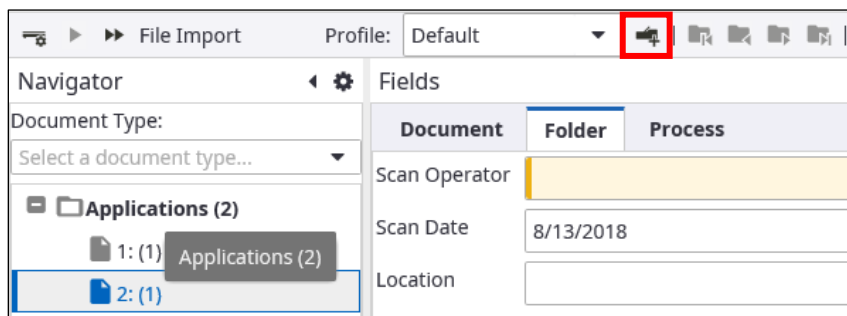
42. **Release** and **Close and unlock** the process.

Lab 15-2

Test the Capture and Loan Application Processes

Test the Capture Process and Loan Application Process

1. Complete a **Job clear down** in **System settings**.
2. Open a **new tab** in a browser and browse to the **xyzbank** logon form.
3. Logon as **pblack**.
4. Select the **Scan Applications** menu and click **New**.
5. Click **File Import**, and browse to C:\KTAEssentials\LabFiles\Documents\Test Set
6. Select the first 2 loan applications, and click **Open**.



7. Click the **Create Job** icon on the toolbar.
8. Select **To Do > Work Queue**.
9. Take and complete the **Document Review** and **Validation** activities (you will need to refresh the work queue).
10. On the **Jobs > Find** menu notice the 2 instances of the Loan Application process (you may need to refresh the job list).

Jobs				
<div> <div> + ✓ ✖ < </div> <div> Refresh Edit Query Actions </div> </div>				
My Queries	<input type="checkbox"/>	Process	SLA (Job)	Expected Duration
Shared Queries	<input type="checkbox"/>	Capture Applications	●	8/14/2018 1:26:58 PM
Active Cases	<input type="checkbox"/>	Loan Application	●	8/21/2018 2:00:00 PM
Live Jobs (default)	<input type="checkbox"/>	Loan Application	●	8/21/2018 2:00:00 PM
Live Jobs Created Today				
SLA - Amber				
			Creator	
			Paul Black	
			TotalAgility	
			TotalAgility	

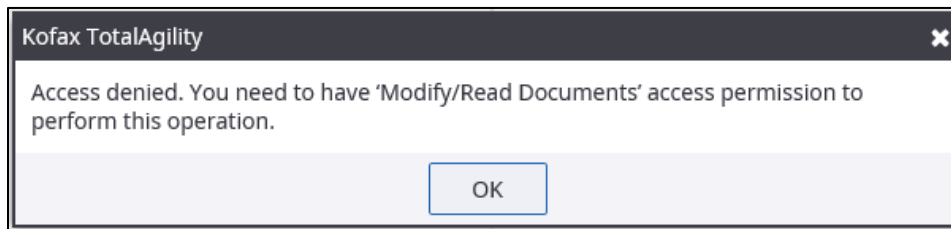
11. Logon as **ssmyth** (if you are not logged on already) and notice the 2 Loan Approval Activities.

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Work Queue				
<div> <div> + 🔍 🗑️ < </div> <div> 🔄 Refresh ✎ Edit Query </div> </div>				
My Queries	Activity Name	Process	Priority	Due Date
▼ Shared Queries				
Alerts	Loan Approval	Loan Application	1	8/15/2018 2:30:00 PM
All Activities (default)	Loan Approval	Loan Application	1	8/15/2018 2:30:00 PM
All Work Due This Week				

12. Take one of the **Loan Approval** activities.

Note: You will receive a message indicating that you do not have permission to Modify/Read the loan application document that is trying to load in the web capture control.



13. Click **OK** and then click **Cancel** to cancel the activity.

14. Navigate to the **Designer**.

15. From the **Main** menu navigate to **System > System settings**, and from the **User behaviour** card, click **Capture operations**.

16. Click the **+** icon, and from the **Resource** dropdown, select the **Group** tab, and select **Approving Officers** (XYZ Bank category).

17. Under the **SDK only** section, check the **Modify/Read Document** checkbox.

SDK only

Create documents and pages ☐

Modify/Read document ☒

Confirm fields ☐

Mask and redact images ☐

18. Click **Save** twice.

19. Navigate to **ssmyth's** work queue and re-take the activity. The application document is displayed in the Web Capture control. Notice that the extracted data is displayed on the form along with the credit score.

Note: The downstream process was initialized with the Application Document Instance Id. The Web Capture control displays the document from the TotalAgility Documents database using the Instance Id.

20. From the **Loan Decision** dropdown, select **Approved** and **Complete** the activity.

21. Take the remaining **Loan Approval** activity.

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22. **Approve** the loan and **complete** the activity.
23. Open a new tab in the browser and **logon** to the **xyzbank** site as **jpik**.
24. The **Post Forms** activities should be pending for the **Admin** group.
25. You may wish to run **Job clear down** before the next lab.

Revision Questions

1. Can you use the Loop activity to loop through a collection of documents in a folder?

2. Can you use the Loop activity to loop through a set of rows obtained from a database table?

3. What should the initial value of the Start Index be when looping through a collection of documents in a folder?

4. The Loop activity can be configured to return the actual document into a document variable?

5. A Loop activity has reached the last document in a folder. The Loop activity executes one additional time. What will be the value of Row Found?

6. What is a complex variable?

7. What Folder variable field type can you map to the complex variable in a loop activity so that you can access the documents in the folder?

8. Can a single expression activity be used to execute more than one expression?

9. Which activity type would you use if you wanted to create an instance of an ordinary process or a case process?

10. Can an actual document be passed to another process?

11. Is it possible to pass an extracted field in a document to another process?

12. How would you insert extracted fields from a document into a SQL database table?

13. A process designer has updated a process to Version 5. This process is initiated from a Create new job activity within an existing process. A job in the system has not yet reached the Create new job activity. The job moves on, and the Create new job activity is executed. Which version of the process will be executed?
