

TECHNICAL TRAINING LAB INSTRUCTIONS

In this lab you will learn how to configure mobile devices as an input source for the Capture Applications process.

Lab 19-1

Configure a Mobile Device as an Input Source

Create a Device Scan/VRS Profile

In this part, you will configure a Scan/VRS profile for a mobile device. The profile will be used by the mobile app to enhance the captured image by applying the following Image Enhancement settings: - Deskew, Auto Crop, Auto Rotate, and Delete Blank Page.

Note: The lab assumes you are capturing A4 size pages at 200 DPI. The Classification project was trained using samples with that paper size and DPI.

1. From the **Main** menu navigate to **Capture > Scan/VRS profiles**, and click **New**.
2. Enter **Mobile Device** as the profile name.
3. Configure the settings as shown:

Edit Scan / VRS profile *

* indicates a required field

General

Name* Mobile Device

Description

Paper size A4 (210mm x 297mm)

Orientation Any

Duplex Simplex

Paper source Any

Resolution 200 dpi

Color Black and white

Image enhancement settings

Deskew ☒

Auto crop ☒

Auto rotate ☒

Delete blank page ☒

Allow runtime editing

Paper size ☒

Duplex ☒

Resolution ☒

Color ☒

Cancel Save

4. Click **Save**.

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Apply Device Scan/VRS Profile

You can assign a Device Scan/VRS Profile to your device. This must be configured in the process properties.

5. From the **Main** menu navigate to **Workflow > Business processes**, and open the **Capture Applications** process.
6. From the **Properties** panel, select the **Capture** tab.
7. From the **Device Scan/VRS profile** dropdown, select **Mobile Device**.

| Device | |
|--------------------|-------------------------|
| Separation profile | Separate Applications × |
| Scan/VRS profile | Mobile Device × |

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

Downloading and Configuring Kofax Mobile Capture

In this part, you are going to configure Kofax TotalAgility to capture documents from a connected and configured iOS or Android-based phone or tablet/pad.

Note: The mobile device MUST be capable of reaching the IP Address (or hostname) of the Kofax TotalAgility server. The TotalAgility web site must have Anonymous authentication enabled. This requirement basically means students will not be able to perform a mobile-based lab in our teaching environment. As such, if the student can establish a testing environment where the mobile device is on the same network as Kofax TotalAgility, the following lab can be completed.

The instructor will demonstrate this lab to the class.

The following instructions apply to both iOS and Droid-based mobile devices. Where differences in the instructions exist, they will be noted (🍏 = iOS; 🤖 = Droid-based).

First, download the Kofax Mobile Capture application.

9. 🍏 If you are using an iOS device, go to the Apple App Store. Login as appropriate and then search for "Kofax Mobile Capture". When you locate the application, download to your device. The application is free and you will get a message upon successful installation.

🤖 If you are using a Droid-based device, go to Google Play. Login as appropriate and then search for "Kofax Mobile Capture". When you locate the application, download to your device. The application is free and you will get a message upon successful installation.

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10. Wi-Fi must be enabled on your device for Kofax Mobile Capture to connect to your demo machine and register the mobile device, AND your mobile device and your demo machine must be on the same network.

11. Now you're going to launch the Kofax Mobile Capture application. Locate the icon in your applications panel and launch the application.



12. When the application has launched, the Settings screen is displayed.

A screenshot of the Kofax Mobile Capture application's settings screen. The screen has a blue header with the Kofax logo and 'MOBILE CAPTURE' text. Below the header is a section titled '*Mandatory Fields' containing several settings: 'Kofax Server' with a toggle switch, 'Hostname' with the value '192.168.1.72', 'Server Type' with a dropdown menu showing 'Kofax TotalAgility', 'SSL' with a toggle switch, 'Port' with the value '80', 'URL' with a text field containing 'URL', 'Anonymous' with a toggle switch, and 'Email' with the value 'user@email.com'. At the bottom of the settings section is a large blue button labeled 'Login'.

13. Enter the login information for accessing your training machine. You may need to add your account to the **Device Users** group. You can also use **Anonymous** access.

14. Tap **Server Type**, and select **Kofax TotalAgility**.

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*Mandatory Fields

| | |
|--------------|-------------------------------------|
| Kofax Server | <input type="checkbox"/> |
| * Hostname | 192.168.1.72 |
| Server Type | Kofax TotalAgility > |
| SSL | <input type="checkbox"/> |
| Port | 80 |
| URL | URL |
| Anonymous | <input checked="" type="checkbox"/> |
| Email | user@email.com |

Server Type

| | |
|---------------------------|---|
| Kofax Front Office Server | |
| Kofax TotalAgility | ✓ |
| Kofax TotalAgility Azure | |

Note: You do not need to provide a password if the TotalAgility account is a windows account. You can select Anonymous if you do not have a TotalAgility account.

- Enter the **Server Hostname** of your demo machine (run *ipconfig* in Windows PowerShell to determine the IP address of your machine).
- Enter the **Username** and **Password** (if applicable) for your demo machine.
Note: You may ignore Domain and Email fields. The Domain field is only used if you are using single sign-on for authentication. The Email field is used to specify an email address to receive confirmation messages.
- Tap the **Login** button at the bottom of the **Account Information** screen. You should get an indication that your device is connecting to the server, followed by the display of the Scan Applications form. Kofax Mobile Capture is now connected to your demo machine.
Note: If you make changes to the device profile, rename the form, or add a new device create new job form, you must logout and log back in to the mobile app pick up these changes.

Login

Capture Document

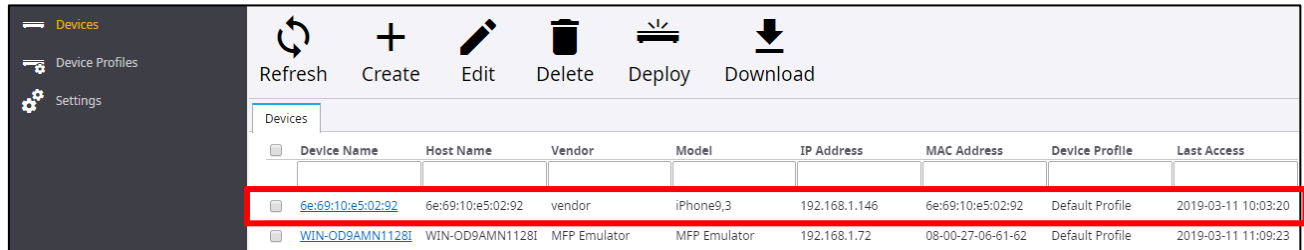
| |
|-------------------|
| Scan Applications |
|-------------------|

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Automatic Registration of the Mobile Device in Kofax Total Agility

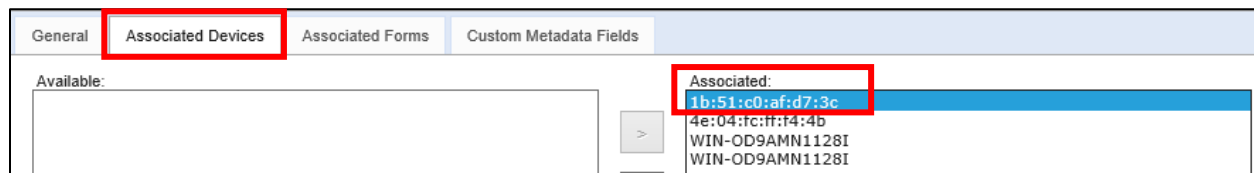
18. From the **Main** menu navigate to **System > System settings**, and from the **Capture** card, click **Devices**.

19. The mobile device should have automatically registered, and be listed.



| Device Name | Host Name | Vendor | Model | IP Address | MAC Address | Device Profile | Last Access |
|-------------------|-------------------|--------------|--------------|---------------|-------------------|-----------------|---------------------|
| 6e:69:10:e5:02:92 | 6e:69:10:e5:02:92 | vendor | iPhone9,3 | 192.168.1.146 | 6e:69:10:e5:02:92 | Default Profile | 2019-03-11 10:03:20 |
| WIN-OD9AMN1128I | WIN-OD9AMN1128I | MFP Emulator | MFP Emulator | 192.168.1.72 | 08-00-27-06-61-62 | Default Profile | 2019-03-11 11:09:23 |

20. Select the **Device Profiles** menu, and open the **Default Profile**. Select the **Associated Devices** tab, and make sure the mobile device (mac address) is listed in the **Associated** area.

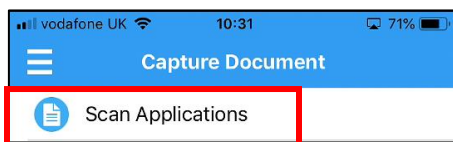


| General | Associated Devices | Associated Forms | Custom Metadata Fields |
|------------|--------------------|------------------|------------------------|
| Available: | Associated: | | |
| | 1b:51:c0:af:d7:3c | | |
| | 4e:04:fc:ff:f4:4b | | |
| | WIN-OD9AMN1128I | | |
| | WIN-OD9AMN1128I | | |

Opening and Submitting a Job in Kofax Mobile Capture

In this part, you will open and submit an application using Kofax Mobile Capture.

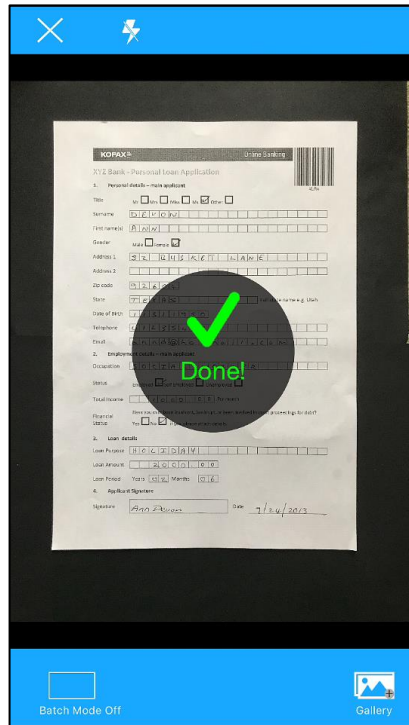
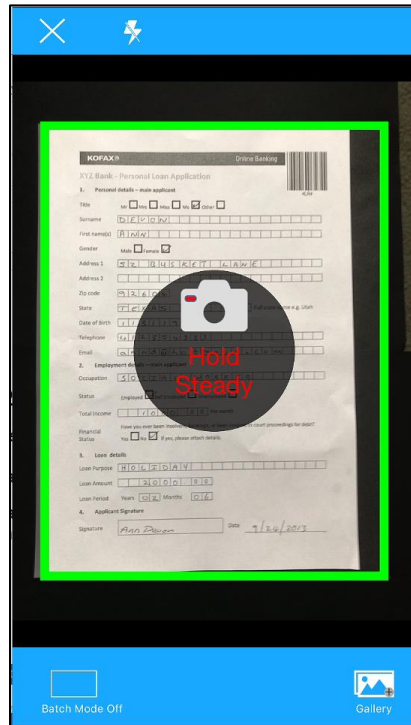
21. From the Kofax Mobile Capture Home screen tap **Scan Applications**.



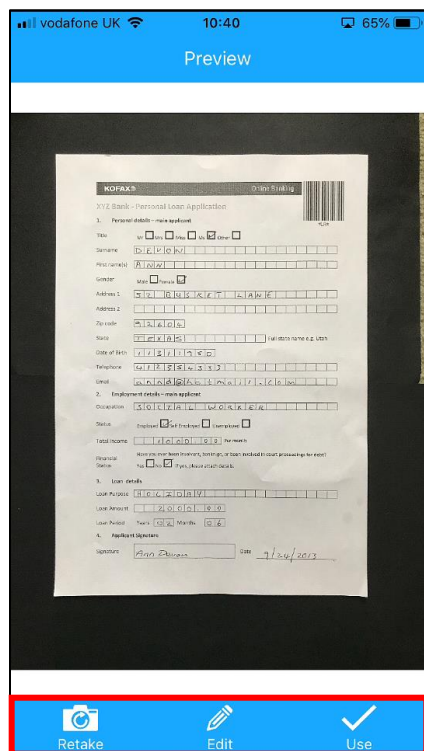
22. Place the sample loan application printout on a flat surface (preferable on a dark background). Center the image within the targets in the Camera screen. Holding the device steady, tap the **Document** photo icon on your device.

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23. When the photo has been taken, you will get an indication that the photo is being saved and processed through the Scan/VRS device profile. A **Preview** is then displayed.

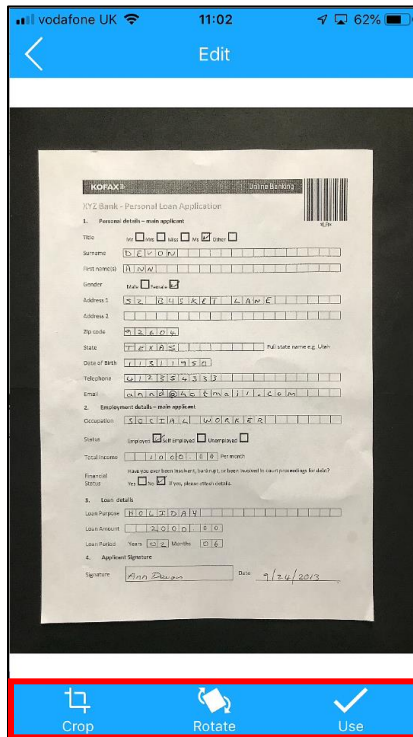


Note: The device profile cleans and de-skews the image, and Preview is displayed. You can choose to retake the photo if required by tapping **Retake** or you can **Edit** the photo.

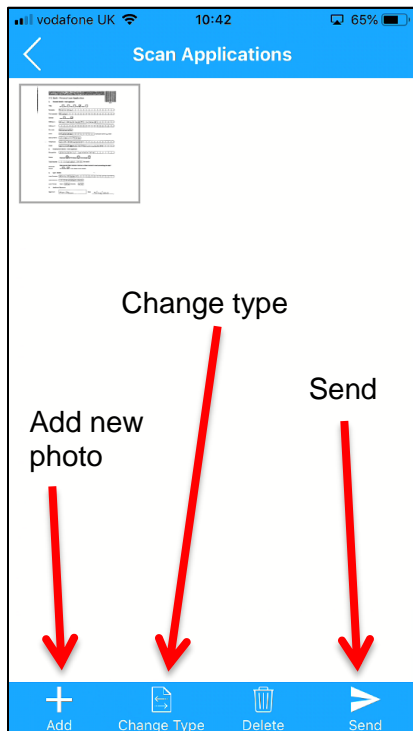
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24. Tap **Edit**.

25. Notice the options to **Crop** and **Rotate** the image.



26. Tap **Use**.

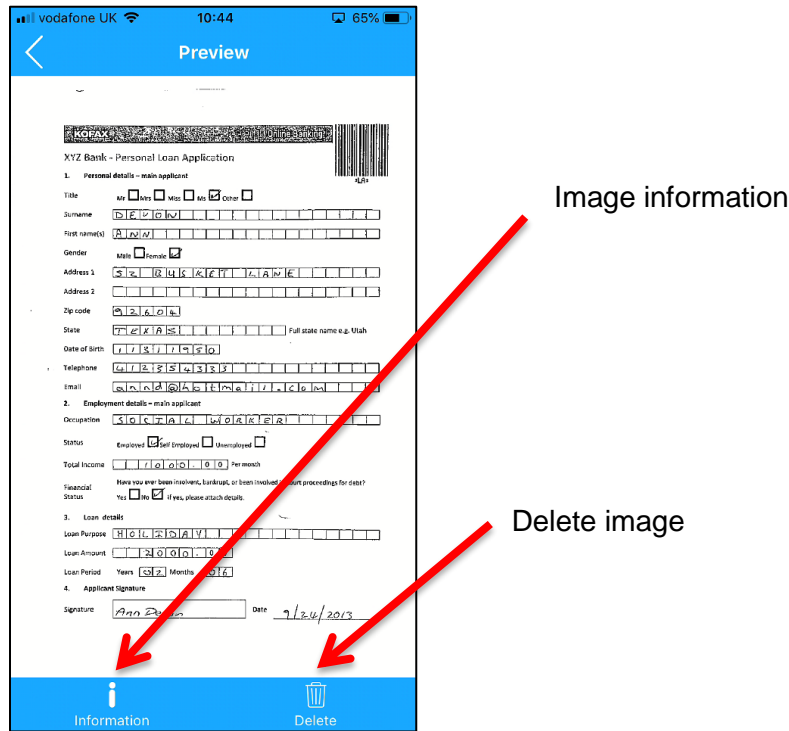


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Note: You can choose a different document type, delete, and add additional photos using the buttons at the bottom of the screen.

27. Tap the thumbnail image of the document to view the image editing options.

28. You can delete the image or get image information (size, dimension, GPS).



29. Tap the **Back** arrow at the top left corner.

30. Tap **Send**.

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31. Enter the **Field Details** as shown:

Scan Operator: Paul Black
Scan Date: 03/04/2019
Location: Irvine

Submit Document

Folder fields

32. Tap **Submit Document**.

33. The image is submitted. After a few moments a **Submitted successfully** message should appear.

Summary

Name: Scan Applications
Total Images: 1
Document Size: 23.53 KB
Date: 05/04/2019, 10:42 am
Scan Operator: Paul Black
Scan Date: 03/04/2019
Location: Irvine

KMC
Submitted successfully
Ok

34. Tap **Ok**.

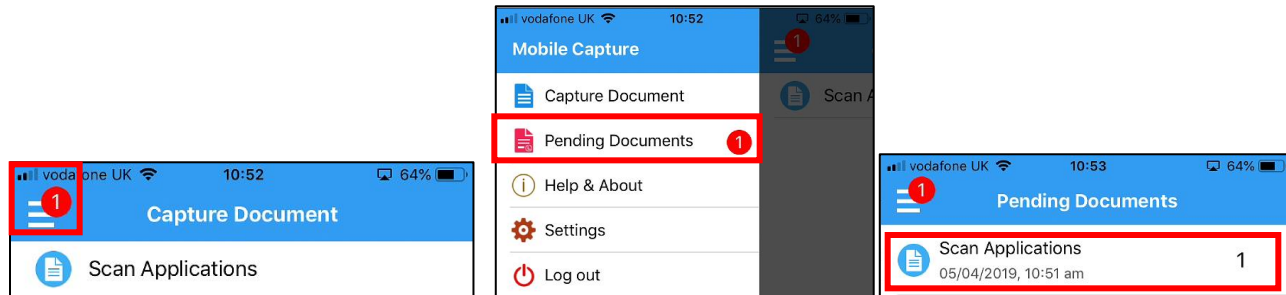
35. The **job** is submitted to **TotalAgility** and you are returned to the Home screen.

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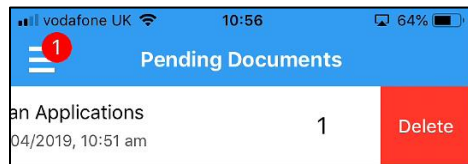
Delete Pending Images

You can delete pending images from the app.

36. Tap the **Settings** icon in the top left header area of the app, and select Pending Documents.

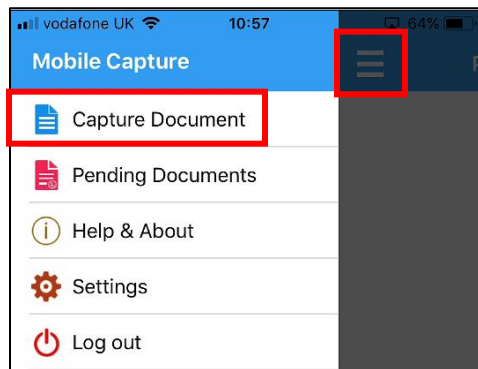


37. Swipe from right to left over the **Pending** images you wish to delete.



38. Tap **Delete**.

39. Tap **Settings** and select **Capture Documents**.

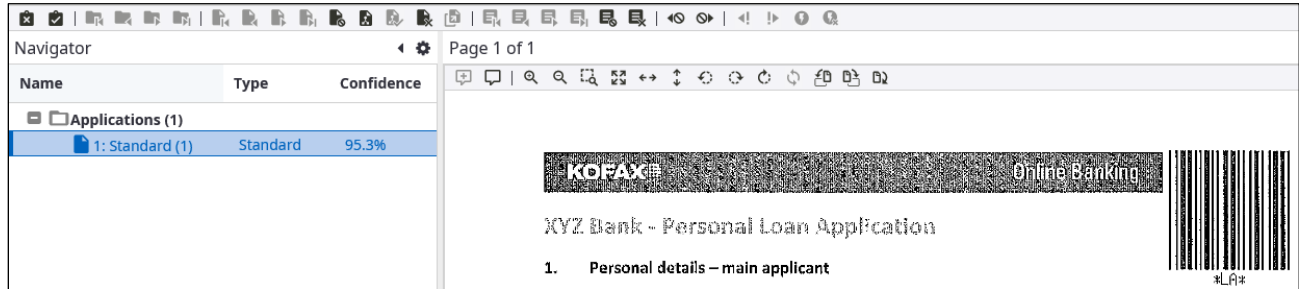
*Reviewing the Results of Mobile Capture in Kofax TotalAgility*

40. Logon to the **xyzbank** workspace as **pblack**.

41. Select **To Do > Work Queue**.

42. The **Document Review** activity should be pending. Click on the link to open it.

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43. Verify that the image captured is the one displayed, and that the document has been classified correctly. You can continue processing the job to completion, or clear down the job.

Important Note

If the document is not classified or extraction results are poor, this is most likely because there are no anchors set to correct document skew. If you wish to improve results, please follow the Self-Learning Lab 09-8 – Anchors. You will need to least 4 anchors to improve results.

Revision Questions

1. You are unsure which versions of the IOS and Android operating systems can be used with TotalAgility. Where would you find this information?

2. Which form type can be displayed on a mobile device to create an instance of a process?

3. It is possible to use a Scan/VRS and separation profile on a mobile device?

4. Do you need a license to create jobs in TotalAgility as a mobile device user?
