

Introduction to the Designer

Work Like Tomorrow.™

KOFAX

Kofax TotalAgility Designer and Workspace

- To access the **Designer** enter:
[http\(s\)://servername/TotalAgility/Designer](http(s)://servername/TotalAgility/Designer)
- To access the TotalAgility **Workspace** enter:
[http\(s\)://servername/TotalAgility/Forms](http(s)://servername/TotalAgility/Forms)
- You can configure common System settings after installation using the Designer

Server Configuration Settings after Installation

- After Installation it is recommended to configure high-level system settings
- From the **Main** menu click **System > System settings**
 - Email server (SMTP) settings
 - Session timeout and Timeout warning period for user
 - Batch session timeout (open capture activities)
 - Multiple logons (checked/unchecked)
 - Archive mode (Automatic/Manual)
 - Disable logon without password (checked/unchecked)
 - Use business calendar (checked/unchecked)
 - Process node colors
- You will be required to restart **TotalAgility Core Worker Service, TotalAgility Streaming Service, and TotalAgility IIS Application Pool**

Introduction to Kofax TotalAgility Designer

Online help

User profile and logout

Logo - Back to Home

Header bar

KOFAX TotalAgility Designer

Trainee ?

Navigation bar
Main menu

- Home
- Workflow
- Business processes
- Case definitions
- Business rules
- Skins
- User interface
- Capture
- Resources
- Import...
- Export...
- Translation...
- Queries
- Monitoring
- System data
- Integration
- Packages
- System

Submenus

Quick links



Welcome Trainee

[Design a process](#)

Design a process to automate a logical flow of activities that must be completed.

[Design a case](#)

Design a case definition to support the overall case as well as fragments, all of which are effectively linked for collecting and sharing case specific information.

[Design a business rule](#)

Design a business rule to build complex business logic without programming to automate and optimize business decisions.

[Design a form](#)

Design a form to provide a user interface to support your application.

[Design an extraction group](#)

Design an extraction group to classify and extract data from documents.

[Design a folder](#)

Design a folder to process a set of documents as a group and track data that applies to all documents.

Turn off Welcome page and display recent items

View recent items

[View recent items](#)

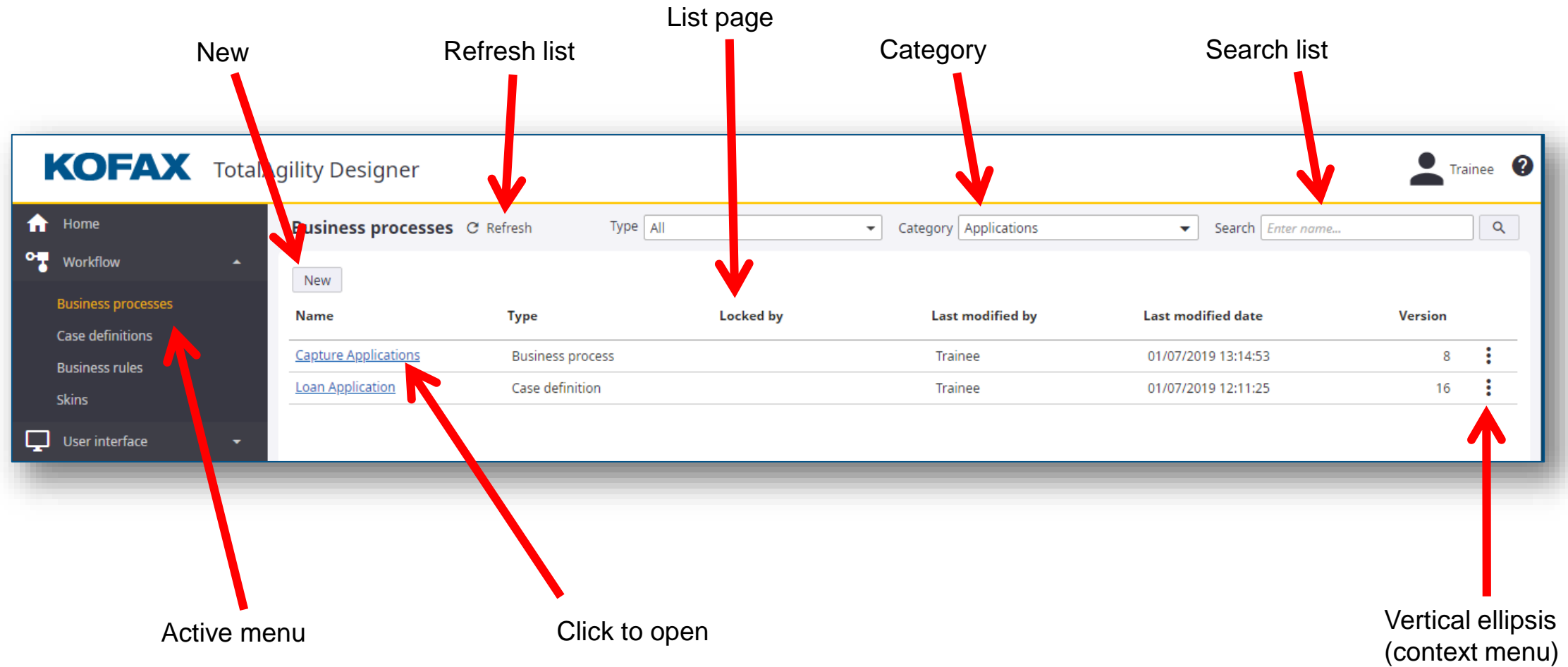
☐

Don't show this page next time

Getting started

[Click here to learn more and get started with TotalAgility](#)

Workflow > Business processes



KOFAX Total Agility Designer

Home Workflow **Business processes** Case definitions Business rules Skins User interface

Business processes Refresh Type All Category Applications Search Enter name...

New

Name	Type	Locked by	Last modified by	Last modified date	Version
Capture Applications	Business process		Trainee	01/07/2019 13:14:53	8
Loan Application	Case definition		Trainee	01/07/2019 12:11:25	16

Vertical ellipsis (context menu)

Vertical ellipsis – Context menu

Vertical ellipsis
(context menu)



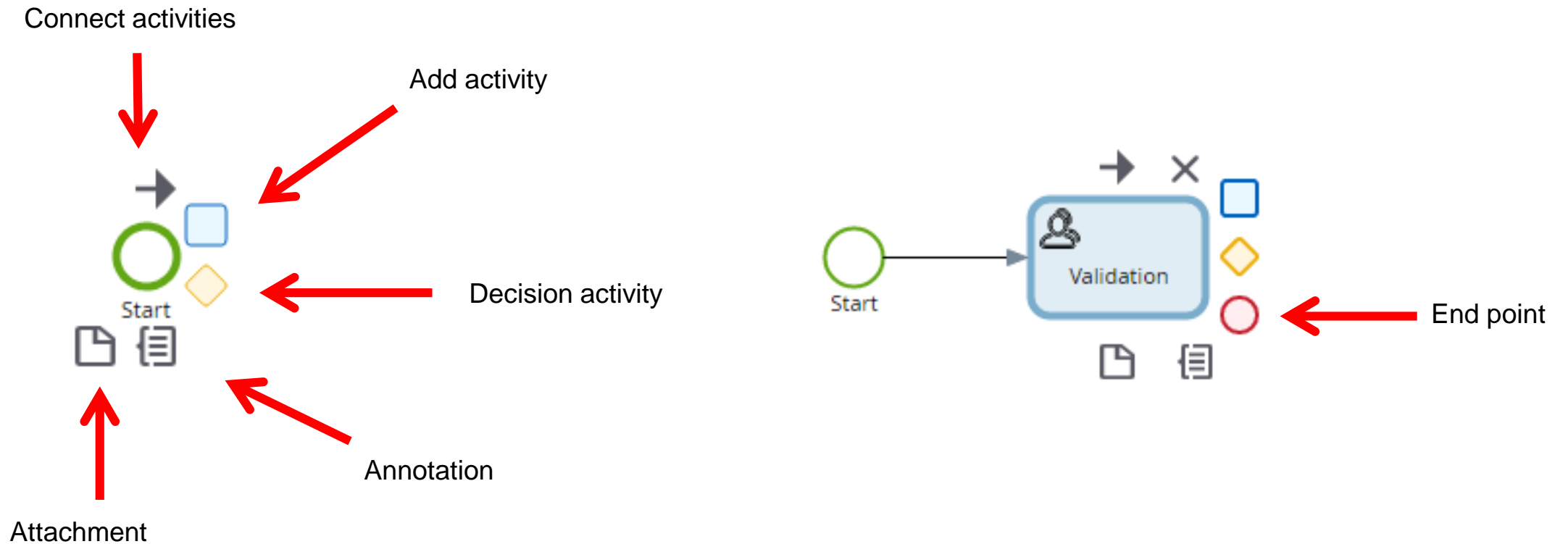
Name	Locked by	Last modified by	Last modified date	Version
Capture Applications		Trainee	11/03/2019 12:54:38	1.1

- Copy
- Delete
- Versions
- Lock
- Unlock
- Debug
- Generate CNJ form
- Generate scan CNJ form
- Generate device CNJ form
- Generate activity forms
- Generate MFP scan CNJ form
- Generate MFP activity forms

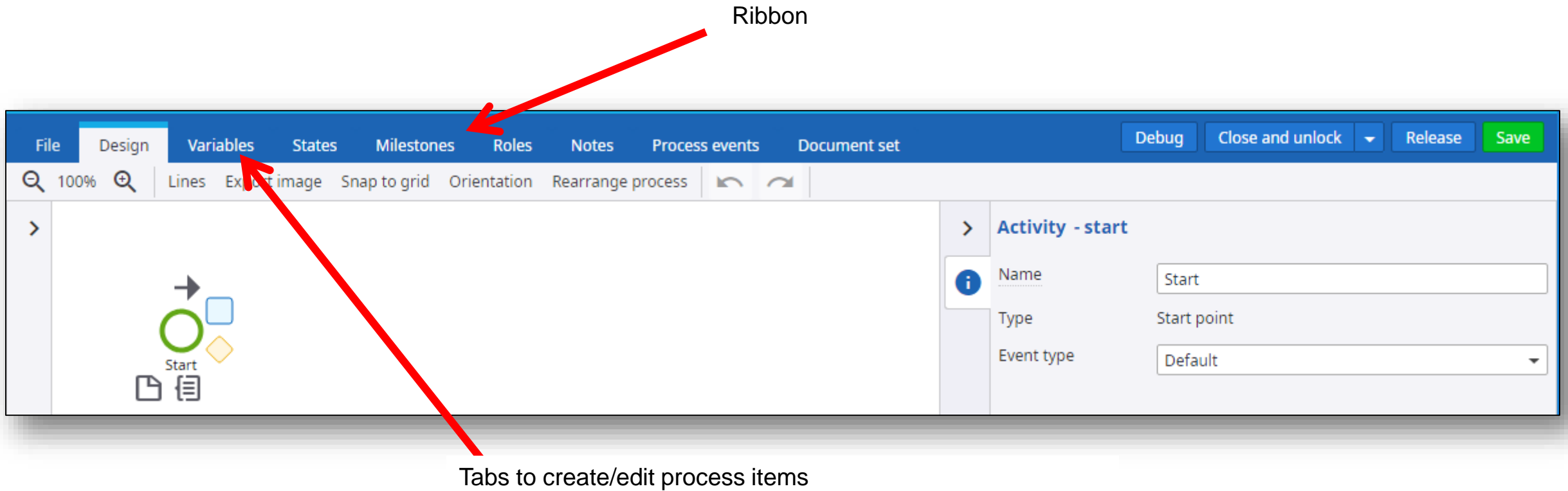
Process designer (opens in new browser tab)

The screenshot displays the Kofax Process Designer interface. At the top, the title bar shows 'KOFAX' and 'Process - New process v0.01*'. Below this is a ribbon menu with tabs: File, Design, Variables, States, Milestones, Roles, Notes, Process events, and Document set. The 'Design' tab is currently active. To the right of the ribbon are buttons for 'Debug', 'Close and unlock', 'Release', and 'Save'. A user profile icon labeled 'Trainee' is also present. The main workspace is divided into a 'Design area' on the left and a 'Properties panel' on the right. The 'Design area' contains a 'Start' activity icon. The 'Properties panel' has a 'Tab' and a 'Collapse/expand panel' button. The 'Properties panel' contains fields for Name, Description, Type, Category, Support skins, Priority, Work type, and Synchronous. Red arrows point to various elements: 'Tab' points to the 'Design' tab; 'Ribbon' points to the ribbon menu; 'Start activity' points to the 'Start' icon; 'Undo/Redo' points to the undo and redo icons; 'Properties panel' points to the 'Properties panel' title; 'Tab' points to the 'Tab' in the 'Properties panel'; 'Collapse/expand panel' points to the collapse/expand icon; 'Debug' points to the 'Debug' button; 'Close and unlock' points to the 'Close and unlock' button; 'Release' points to the 'Release' button; and 'Save' points to the 'Save' button.

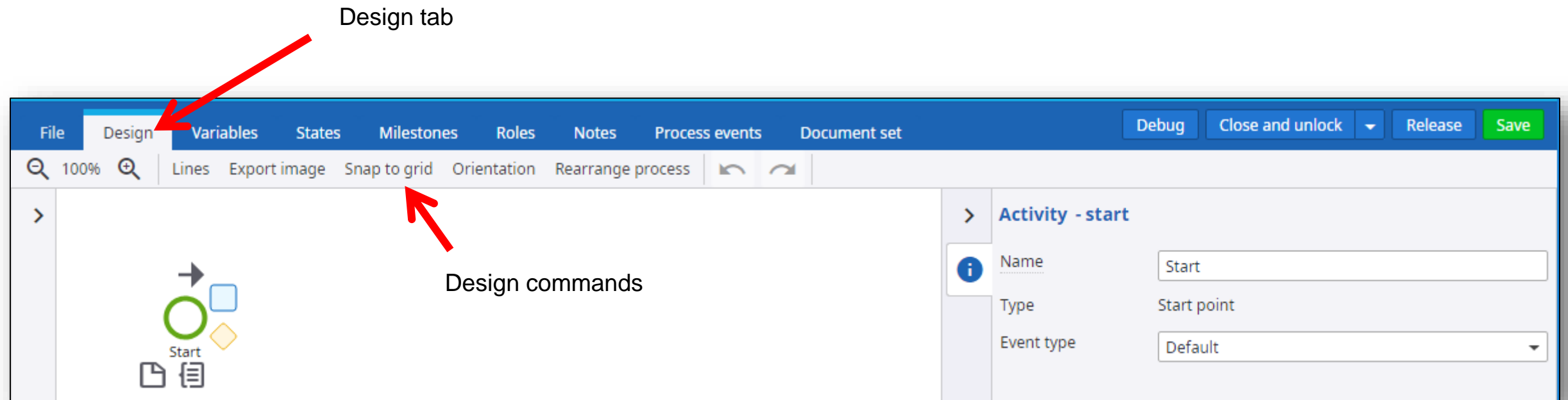
Satellite Activities



The Ribbon

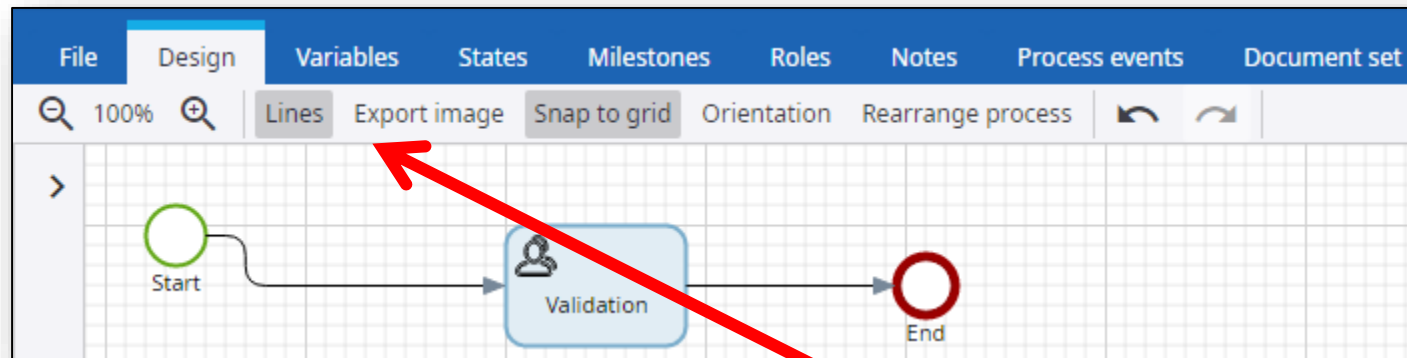


The Design tab



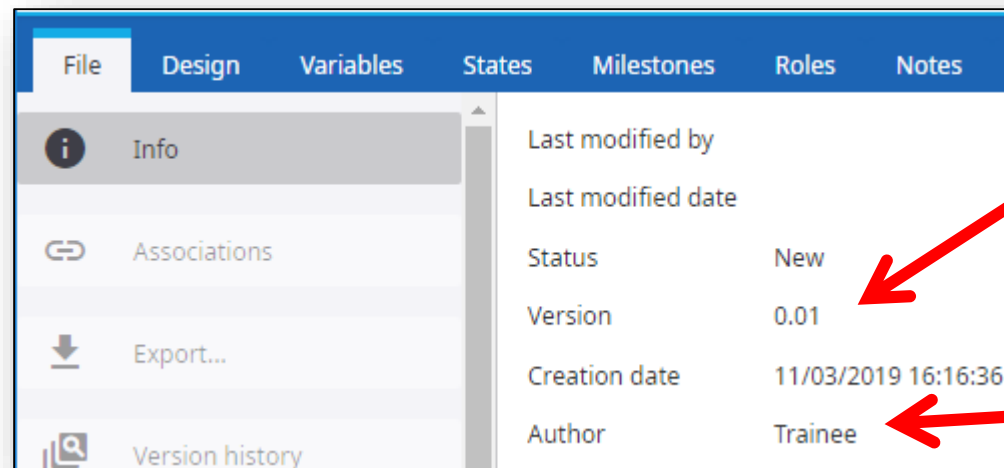
Design Commands

- Zoom in/zoom out
- Lines - Displays gridlines
- Export image - Creates a jpg of the process which is downloaded to the client
- Snap to grid - Snaps activities to the gridlines
- Orientation - Horizontal or vertical display of process
- Rearrange process - Auto alignment of process
- Undo/Redo



Design commands

The File tab



Process version

Author

The Properties panel

The screenshot shows the Kofax software interface. The top menu bar includes 'File', 'Design' (selected), 'Variables', 'States', 'Milestones', 'Roles', 'Notes', 'Process events', and 'Document set'. On the right of the menu bar are buttons for 'Debug', 'Close and unlock', 'Release', and 'Save'. Below the menu bar is a toolbar with icons for zooming, lines, export image, snap to grid, orientation, rearrange process, and undo/redo. The main workspace on the left contains a green circle labeled 'Start'. On the right, the 'Properties panel' is open, titled 'Process - capture applications'. It features a vertical list of property icons on the left and their corresponding values on the right. Two red arrows point from text labels to specific properties: 'Name property' points to the 'Name' property (value: 'Capture Applications'), and 'Capture tab' points to the 'Capture' icon in the property list. The properties listed are: Name, Description, Type (Business process), Category (Applications), Support variants, Priority (1), Work type, and Synchronous.

File Design Variables States Milestones Roles Notes Process events Document set Debug Close and unlock Release Save

100% Lines Export image Snap to grid Orientation Rearrange process

> Start

> Process - capture applications

Name Capture Applications

Description

Type Business process

Category Applications

Support variants

Priority 1

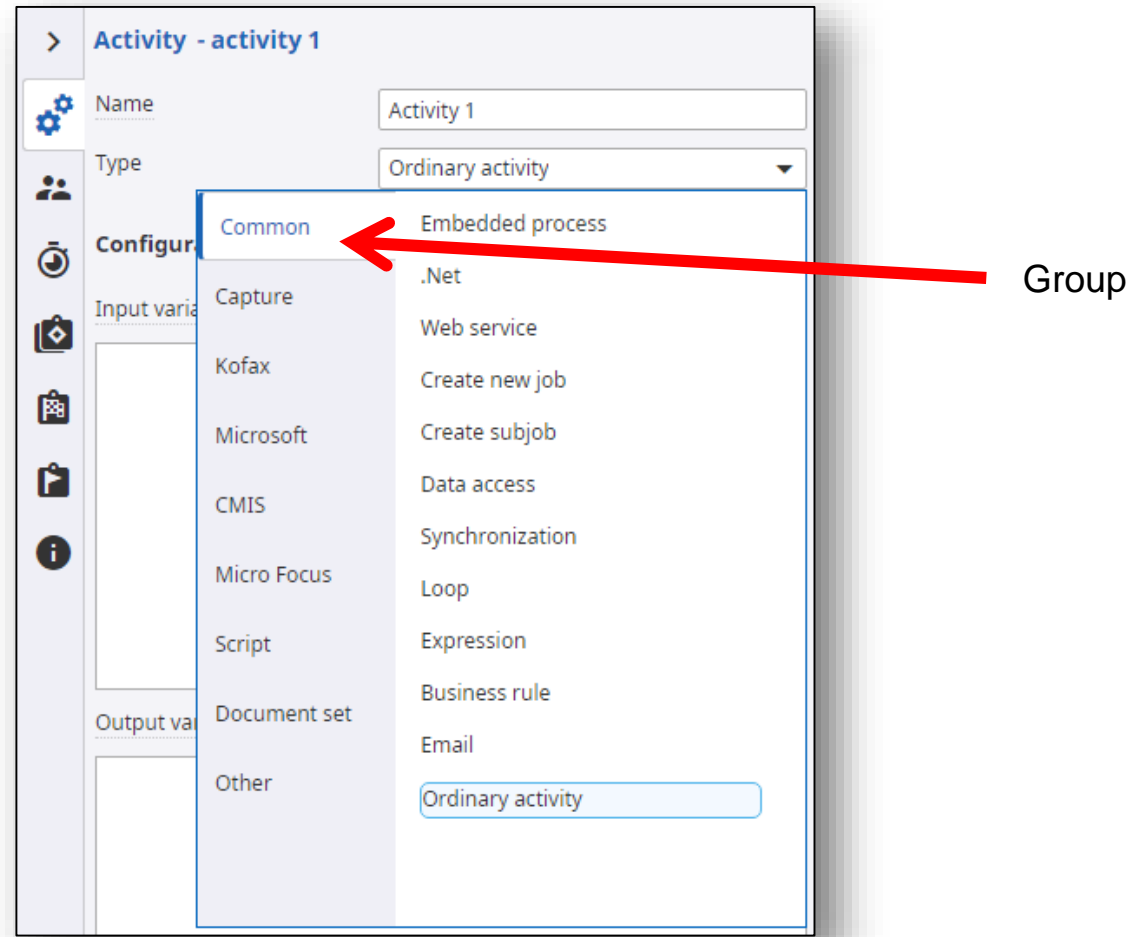
Work type

Synchronous

Name property

Capture tab

Groups



Dialogs

- If you create a new item, a dialog is displayed
- Mandatory fields have a red asterisk beside them

New variable

** indicates a required field*

Name*

ID*

Type

Initialization ☐

Value

Cancel OK

New action *

General ** indicates a required field*

Associations

Type*

Name*

Description

Do you want this action to support different behavior for different languages?

Multilingual ☐

Message type

Title*

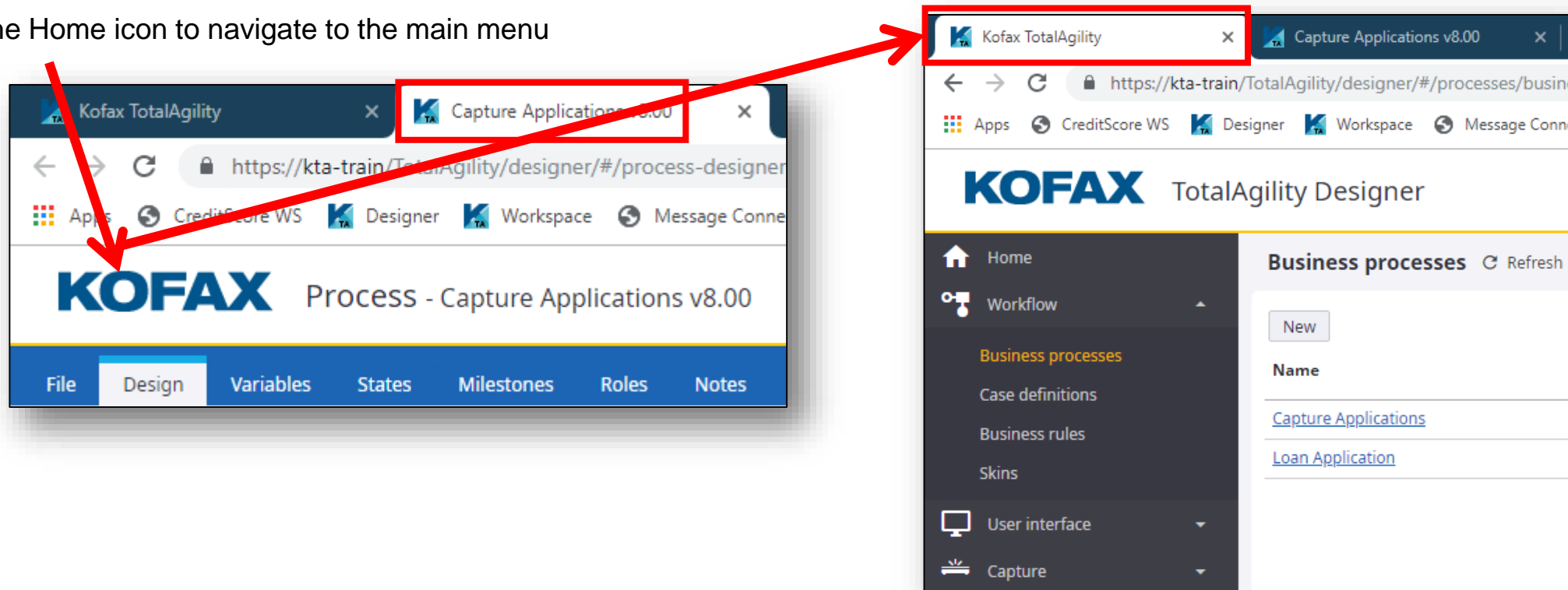
Message text*

Typing mode or
dropdown (Toggle)

Navigating to the Home Page

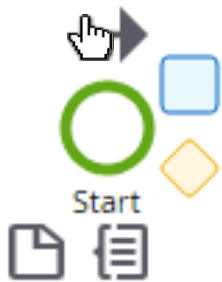
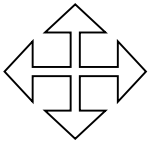
- When e.g. the Process designer is open you can navigate back to the main menu using the **Home** icon

Click the Home icon to navigate to the main menu



Select, Move, and Connect Activities

- Select an Activity
- Move an Activity
 - Select the activity
 - Hold left mouse button down and drag to new position
- Connect Activities
 - Select the activity
 - Hover mouse over the connector to get the hand cursor
 - Hold left mouse button down and drag to the of the activity you wish to connect to



Process design basics



- Create a business process
- Set process name
- Add ordinary activities
- Connect activities
- Rearrange process
- Save/Release and Lock/Unlock
- Close process
- Categorize a process