

Personas

Work Like Tomorrow.™

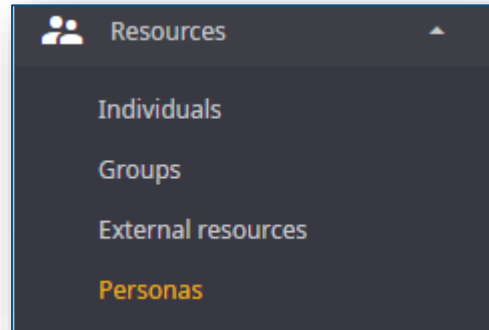
KOFAX

Persona's

- Personas allow you to define a 'type' of resource. Each distinct persona has very different interests and needs.
- Why?
 - A forms solution has many types of users, all interested in different tasks, solving different problems and searching for different information
 - The aim of this feature is to create targeted landing pages and content to go with them for each persona
- Benefit
 - When you have several people working in a single system you can create targeted landing pages for them. The user is automatically redirected to that page on logon whereby they are immediately presented with content most important for them

Create a Persona

- From the **Main** menu navigate to **Resources > Personas** click **New**



New persona *

** indicates a required field*

Name*

Category*

Description

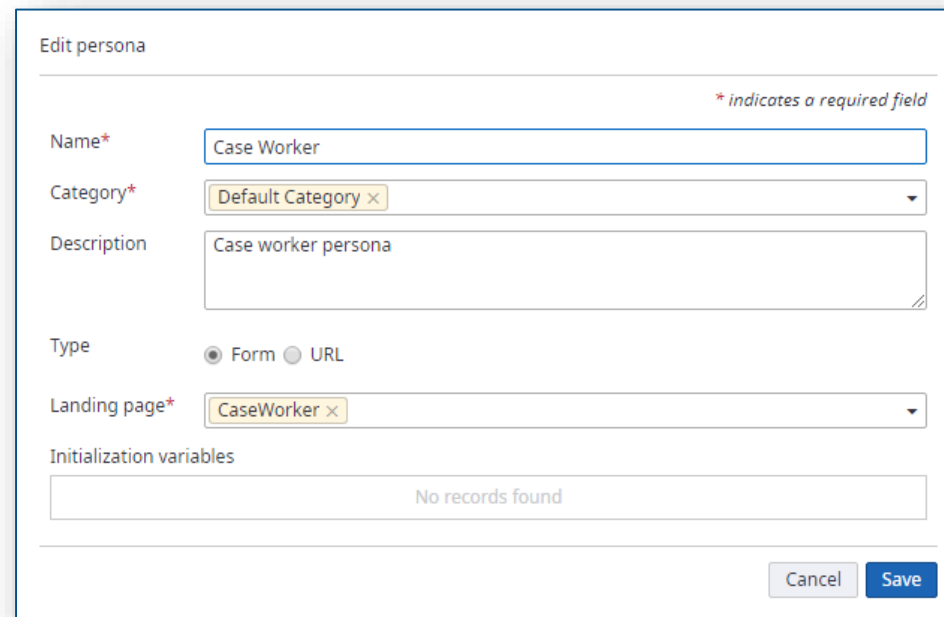
Type ☒ Form ☐ URL

Landing page*

Initialization variables

Persona's

- A persona itself is a very simple concept
 - It consists of a category, name and description
 - And an associated form or a URL
- 4 personas with sample forms are supplied out of the box
 - Case Worker
 - Administrator
 - Supervisor
 - Task Worker



The screenshot shows a web-based form titled "Edit persona". At the top right, a note states "* indicates a required field". The form contains the following fields and controls:

- Name***: A text input field containing "Case Worker".
- Category***: A dropdown menu showing "Default Category" with a close button (x) and a downward arrow.
- Description**: A text area containing "Case worker persona".
- Type**: Radio buttons for "Form" (selected) and "URL".
- Landing page***: A dropdown menu showing "CaseWorker" with a close button (x) and a downward arrow.
- Initialization variables**: A section with a table that currently displays "No records found".

At the bottom right of the form are two buttons: "Cancel" and "Save".

Persona's

- Associating a persona with a resource (internal or external)
 - Via resource configuration (designer or workspace)
 - Persona is optional and only one can be associated with resource

The screenshot shows a software interface for editing an individual. On the left is a sidebar with tabs: 'General', 'Account', 'Organization', 'Membership' (highlighted), and 'Advanced'. The main area is titled 'Edit individual *'. Under the 'General' tab, there are three sections: 'Persona' with a dropdown menu showing 'Task Worker x' (highlighted with a red box), 'Working group' with an empty dropdown, and 'Associated groups' with an 'Add' button. Below these is a large empty box labeled 'Validation Operators x'.

- Multiple resources can updating by update a group – all members will have same persona.

Persona's



- When a resource logs into the workspace and they have a persona associated then they will automatically be redirected to the form or URL associated with that persona
- A user can also update their own persona via profile page

Updating a Groups Persona

- You can apply/clear a persona to/from all the members of a group in one step using the ellipse icon in the Resource > Groups list page

The screenshot shows a web interface with a tab labeled 'Validation Operators'. A context menu is open, displaying three options: 'Delete', 'Assign persona', and 'Clear persona'. The 'Assign persona' option is highlighted with a red rectangular box. Below the menu, a dialog box titled 'Assign persona *' is displayed. It contains a label 'Persona*' followed by a dropdown menu currently showing 'Task Worker' with a close icon (x). A red asterisk is present next to the label. To the right of the dropdown, a note states '* indicates a required field'. At the bottom right of the dialog are 'Cancel' and 'Apply' buttons.

Persona's – Task Worker View

KOFAX TotalAgility Workspace

To Do ▾Scan Applications ▾Jobs ▾Resources ▾Administration ▾

Work Queue

↻ Refresh

SLA	Name	Process	Priority	Due Date
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Notes (0)

Status	Alert
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Quick Links

Link	Quick Link
	Reassign Work
	Create Delegation
	View Taken Activities
	Send Note
	Contact Supervisor
	Change Working Group

Persona's – Supervisor View

KOFAX TotalAgility Workspace

[To Do](#) [Scan Applications](#) [Jobs](#) [Resources](#) [Administration](#)

Team Work

View work for: ☒ My Teams ☐ My Subordinates

[Refresh](#)

SLA	Activity Name	Process	Prio...	Assigned To	Due Date	Actions
●	Validation	Capture Applications	1	Everyone	01/07/2019	Select ▼
●	Validation	Capture Applications	1	Everyone	01/07/2019	Select ▼

Notes (0)





Status	Text
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Quick Links

Link	Quick Link
Link	Reassign Work
Link	Send Note
Link	Change Working Group
Link	Create Delegation
Link	My Work


Persona's – Case Worker View


KOFAX TotalAgility Workspace




To Do ▾Scan Applications ▾Jobs ▾Resources ▾Administration ▾

Cases

 Refresh

Search: 

Process	P...	Creation Time	Case Reference	Actions	SLA (Job)
Loan Appli...	1	01/07/2019	RD001	Select ▾	

Case Summary

☒ Tasks(0)☐ Documents(0)

Status:


Open For:

Time Spent:

State:

SLA:

Milestones:




 Refresh

Activi...	Activity Name	Process	Due Date	Actions
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Notes (0)

Status	Alert
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Quick Links

Link	Quick Link
	My Work
	Create New Case
	Contact Supervisor

Persona's – Administrator View

KOFAX TotalAgility WorkspaceHome Mail Help User

To Do ▾ Scan Applications ▾ Jobs ▾ Resources ▾ Administration ▾

Suspended Jobs

Refresh Search: Job ▾ Enter Job ID Q

Job Id	Creation Time	Process	P...	Creator	Actions
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User Log

Logout User(s) Refresh

<input type="checkbox"/>	User Name	Name	Last Action Date
<input type="checkbox"/>	KTA-TRAIN\Trainee	Trainee	01/07/2019 15:04:41
<input type="checkbox"/>	KTA-TRAIN\Trainee	Trainee	01/07/2019 15:04:52
<input type="checkbox"/>	pblack	Paul Black	01/07/2019 15:04:51

Notes (0)

Status	Text	Redirect P...
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Quick Links

Link	Quick Link
🔗	My Work
🔗	Contact Supervisor
🔗	Send Note
🔗	Remove Finished Jobs
🔗	View Audit Log
🔗	Clear Audit Log
🔗	Upgrade Jobs