

Installing Kofax TotalAgility 7

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KOFAX

Kofax TotalAgility Installation Options and User Access

- On-Premise (Used in this training course)
 - Install TotalAgility within your organizational infrastructure
 - Must meet installation requirements e.g. IIS, SQL Server, .NET
 - During install a Windows user account and password is specified

Kofax TotalAgility Installation Options and User Access

- Software as a Service (SaaS) - Azure Cloud Based
 - As part of the agreement with Kofax, a new instance of Kofax TotalAgility is created. An email is sent to you detailing your login credentials to both the Kofax TotalAgility Designer and Workspace.
 - Azure is a managed service, i.e. Kofax manages and maintains the underlying architecture and database

Kofax TotalAgility 7 Software as a Service (SaaS)

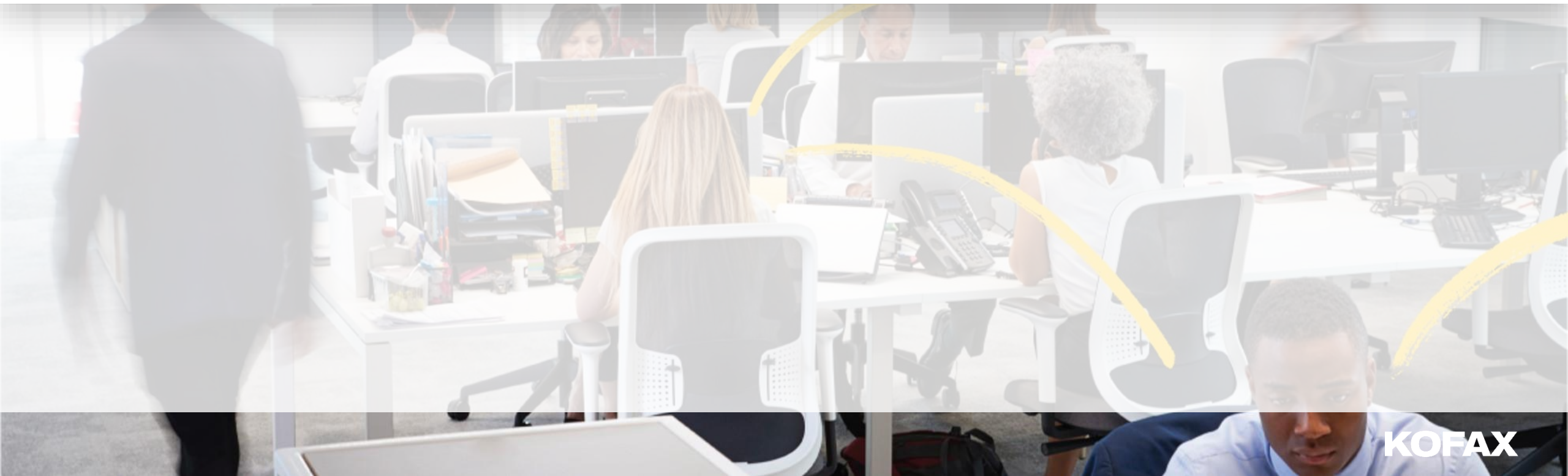
	On-Premise		Cloud	
Platform	Customer supplied		Windows Azure	
Cloud-based	No		Yes	
Infrastructure	Dedicated	Shared	Dedicated	Shared
Deployment Options	Dedicated	Multi-tenant	Dedicated Tenancy	Multi-tenant
License Type	Perpetual		SaaS-based subscription	
Support	Separate support contract		Included	
Managed infrastructure	No		Yes	

Kofax TotalAgility 7 in the Cloud

- Designed for Microsoft Windows Azure
- Rapid customer deployment
- Subscription based pricing, low initial cost
- Support and upgrades included in subscription
- Elastic capacity



TotalAgility Licensing



Licensing Overview – On Premise

- Available as a perpetual license
- Evaluation License - If a license is in evaluation mode then licenses are checked with max of 4 concurrent logged on users permitted. Volume restrictions also apply
- TotalAgility Concurrent Full Users– The number of users simultaneously logged into the system will be limited based upon licensing. Each session consumes a license, even if for the same user. For example, logging into the designer and the workspace simultaneously will take two concurrent licenses
- TotalAgility Concurrent Limited Users - Anonymous users will be limited to creating new jobs or getting the properties of jobs in progress that they belong to. Limited users will consume a limited user license

Licensing Overview – On Premise (cont.)

- Total Agility Page Volume – Each time a page is added to the system a licensing decrement will occur. This might happen from an import connector or manual scan
 - Pages that arrive from MFPs and Mobile devices will decrement volume
 - Imported files of any supported type will decrement page volumes
 - PDF will not decrement page count unless it is passed for Image Processing, Classification, or Extraction

Licensing Overview - SaaS

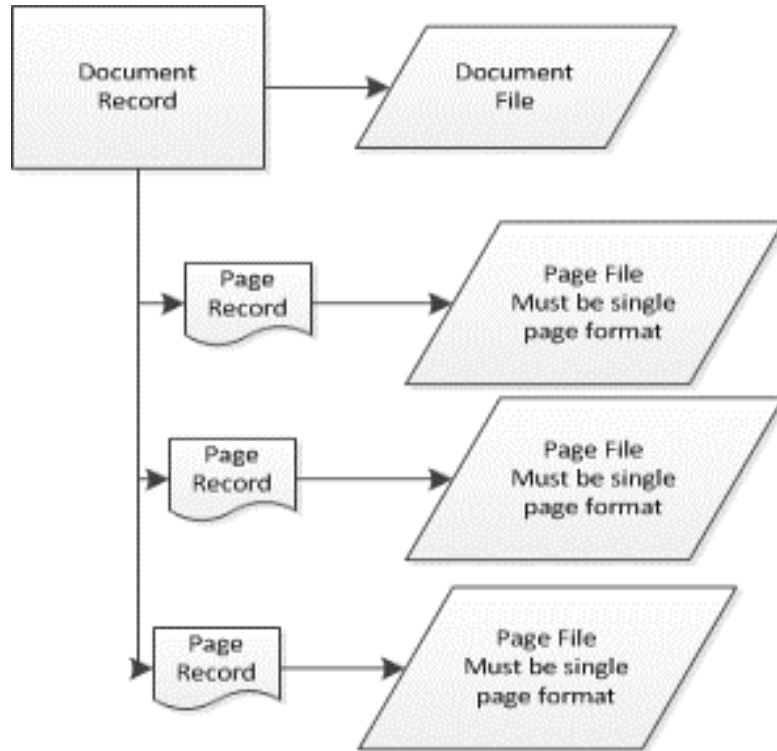


- Available as multi-tenant or dedicated instance hosted SaaS subscription service
- Simple, value based pricing model
- Contact your Kofax Reseller or Kofax Internal Sales Rep

TotalAgility Page Count Licensing

- Page Licensing Model is straightforward
 - Imaging Page Count is decremented when a page is created
 - Transformation volume is decremented when a page is used in a transformation type activity
- Implementation details
 - When are pages actually created in KTA
 - Do we give credits for blank removal
 - What is a Transformation type activity exactly
 - Etc...

TotalAgility Imaging Page Count



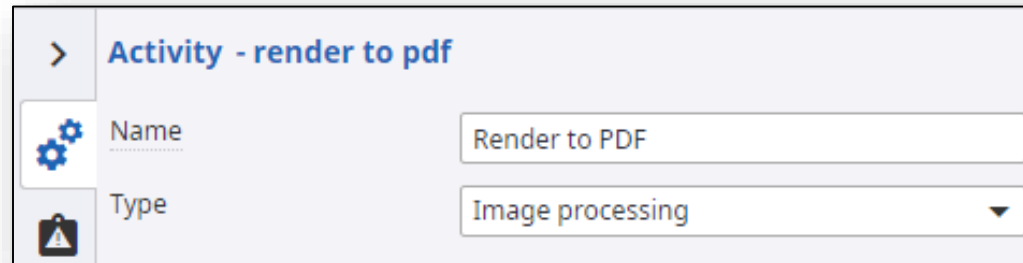
Page <> Document

Page volume is not decremented when a document is created.

- ◆ There are two “levels” where files can be stored
 - ◆ Document level and Page level
- ◆ Document level used to store multi-page files:
 - ◆ PDF, Text, HTML, Other
- ◆ Page level used to store single-page image files:
 - ◆ Bmp, Gif, Jpg, Png, Tiff

TotalAgility Imaging Page Count

- When can pages be created?
 - A page can be created by ingesting it
 - Mobile Device, MFP, Scanning or Importing via KIC or the SDK.
 - A page can be created by an activity
 - If a document has a PDF, Text, HTML, RTF, Word Document, Excel or PPT and Image Processing is run on it pages will be created
 - A page can be created by a copy operation using the SDK
- A page moved via a “Transfer” activity is not a page creation



Activity - render to pdf	
Name	Render to PDF
Type	Image processing

TotalAgility Imaging Page Count

- When using Scan create new job when do we consider a page created for licensing?
 - When a job is created using the scan client
 - For example if you scan pages and do not create the job then no pages will be decremented.
- When a Scan Activity completes, the “net” addition of pages is the pages created.
 - This means that if during a session pages are added then removed it will not impact the page count
 - No “credits” are given if pages are deleted
 - If the user cancels an activity, the “net” addition of pages is still counted.
 - Blank page deletion removes blank pages at scan time, thus for licensing a page wasn’t created.

Email Import Licensing



- Email Body
 - The body of an email can either create a document or the contents can be put in a field based on this option
 - Upon import in either case a page count will not be decremented since a page was not created
- Email Attachments
 - Each attachment creates a separate document
 - Single page image format attachments create a document with one page. Thus if the attachment is a Bmp, Gif, Jpg, Png, Tiff a page will be created in the document and a page count will be decremented

Email Import Licensing



- Email Attachments Continued
 - Multi-page tif attachments are split into multiple single page .tifs. The document created will then have multiple pages and for each page a page volume license will be decremented
 - Mutli-page attachments create a document with no page records. Therefore attached HTML, PDF, Office documents, Text files will not decrement page volume when imported
 - As noted above based upon the business process pages may be created later and volume will be decremented

Blank Page & Separator Sheet Handling - Thin Client Scanning

- Thin client scanning using scan profile with “Delete Blank Page” enabled does not create a page for licensing.

Delete blank page ☒

File Import Profile: Default

Navigator

Document Type: Select a document type...

Applications (0)

Fields

Document Folder Process

Scan Operator

Scan Date 07/03/2019

Location

- Scan time separation with “Delete Patch Code Separator Sheet” does not create a page for licensing

PATCH CODE

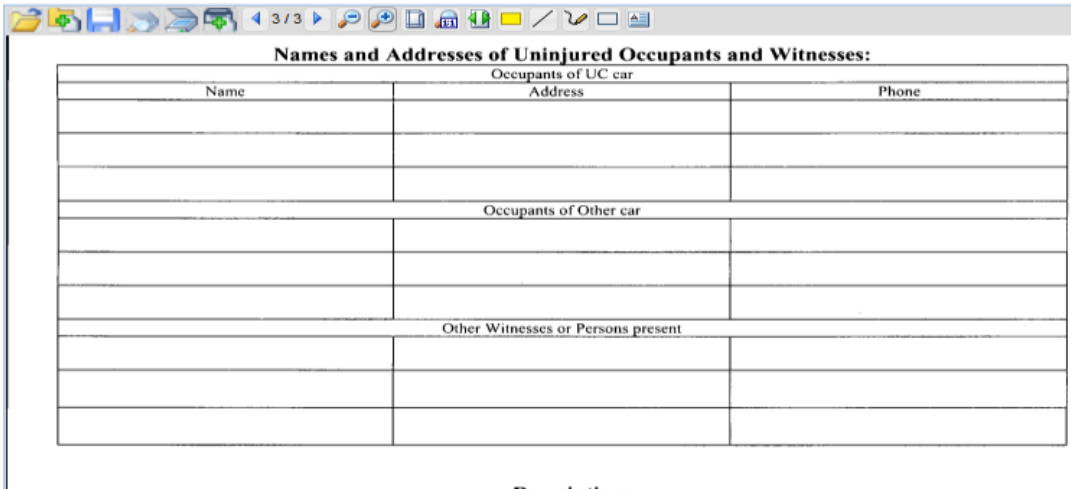
Patch code separation ☒

Patch code type

Delete patch code separator sheet ☐

Blank Page & Separator Sheet Handling - Web Capture Control

- In this case blank pages will be deleted so for licensing no page is created. This applies to images that are imported as well as scanned
- The Web Capture control does not perform document separation and will create a page for separator sheets



The screenshot shows a web browser window with a form titled "Names and Addresses of Uninjured Occupants and Witnesses:". The form is divided into three sections: "Occupants of UC car", "Occupants of Other car", and "Other Witnesses or Persons present". Each section has a table with three columns: "Name", "Address", and "Phone".

Names and Addresses of Uninjured Occupants and Witnesses:		
Occupants of UC car		
Name	Address	Phone
Occupants of Other car		
Other Witnesses or Persons present		

The Web Capture control can be configured to use a Scan profile that removes blank pages.

Blank Page & Separator Sheet Handling – MFP

- Only the “net” addition of pages created as part of device ingestion will decrement imaging page volume license
 - Any blank pages removed by the assigned “Device Scan/VRS Profile” will not decrement since no page was created for licensing
 - Any patch code separator sheet removed by the assigned “Device Separation Profile” will not decrement since no page is created
 - All other pages are created and will decrement imaging page volume license



Device	
Separation profile	Separate Applications × ▼
Scan/VRS profile	Mobile Device × ▼

Blank Page & Separator Sheet Handling

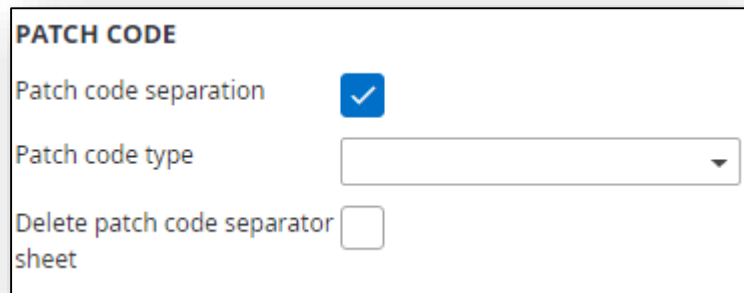
- TotalAgility does not perform image processing or use separator sheets during import of pages by KIC, SDK or File Upload
 - Any blank pages that are imported via these methods will count against page count
 - Any separator sheets that are imported will count against page count

Blank Page & Separator Sheet Handling – Image Processing/Separation Activities

- After a page has been created, there is no credit given if it is removed.
- If blank pages have already been created and Image Processing is used to remove them no credit is given
- If a document (e.g. PDF, Word, etc) has blank pages and IP is used to remove blanks then no page will be created for the blanks

Blank Page & Separator Sheet Handling – Image Processing/Separation Activities

- After a page has been created, there is no credit given if it is removed.
- If pages have already been created and a separation activity is configured with “Delete Patch Code Separator Sheet” no credit is given.
- If a document (e.g PDF, Word, etc) has separator sheets and delete separator sheet is configured a page is not created for the separator sheet for licensing



The screenshot shows a configuration window titled "PATCH CODE". It contains three settings: "Patch code separation" with a checked checkbox, "Patch code type" with a dropdown menu, and "Delete patch code separator sheet" with an unchecked checkbox.

PATCH CODE	
Patch code separation	<input checked="" type="checkbox"/>
Patch code type	<input type="text"/>
Delete patch code separator sheet	<input type="checkbox"/>

Documents sent to a Composite activity could have both blanks and separator sheets removed prior to decrement

TotalAgility Transformation Page Count

- Transformation Page Count is decremented when:
 - Pages used by classification in a “KTM” type project
 - Classification using a separation profile will not decrement Transformation volume
 - Pages where extraction was performed
 - Exception - Pages where only a bar code locator is used will not decrement Transformation volume
 - Transformation volume will not be charged more than once per page
 - A2IA add-ons decrement as before
 - Bar Code exception was included for equivalence to Kofax Capture use cases

Out of Volume Scenarios



- Attended Scanning
 - Each time a scan create new job form or scan activity starts a check will be performed
 - If the system is out of volume then the form will be disabled and the user will not be able to scan
 - If the user is allowed to start scanning then the system will allow the job to be created
- Transformation Server
 - If license is out of volume before TS is going to start adding pages the job is suspended
 - If license becomes out of volume during processing the activity will be completed

TotalAgility Concurrent Full User

- TotalAgility Concurrent Full User
 - Checked out when a user logs on to the system either manually or via the logon API
 - Checked out when a user logs in on a MPF device
 - Anonymous MFP users do not check out a user concurrent user license but require a limited user license
 - Released when the session is closed either from a log out or a session time out
 - If a user logs on to KTA multiple times then multiple sessions will be created and multiple licenses will be decremented

TotalAgility Limited Users

- TotalAgility Limited Users

- Allows anonymous users to create new jobs or get properties of jobs in progress.

Specifically the following apis will allow a limited user session ID

- JobService.CreateJob
 - JobService.CreateJobInCase
 - JobService.CreateJobInCaseWithDocuments
 - JobService.CreateJobWithDocuments
 - JobService.GetJobProperties
 - JobService.GetJobProperties2
 - JobService.GetMinJobDetails
 - CaseService.CreateCase
 - CaseService.CreateCaseWithDocuments
 - CaseService.GetCaseJobProperties
 - CreateJobSyncWithDocuments

Concurrent users are typically internal users (employees) and Limited users are typically external users (customers, suppliers)

For an anonymous MFP user to see shortcuts that have been assigned to the device a limited user license must be present.



RTTI Licensing

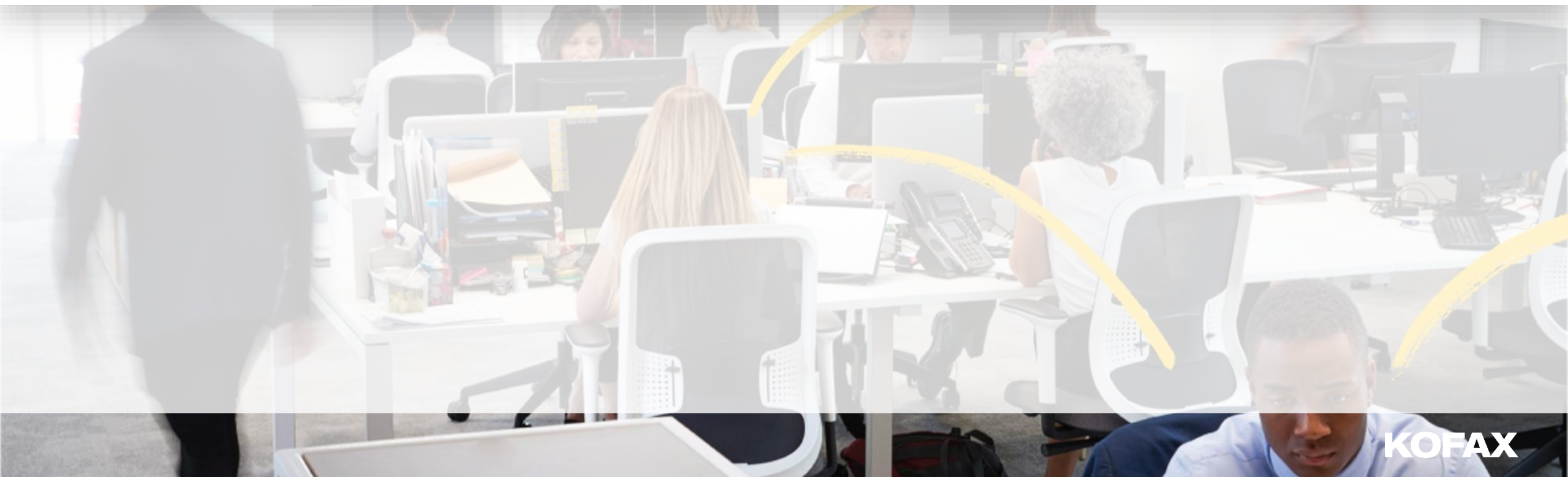
- There is no page volume inherently required to use the API

```
public SyncJobWithDocuments CreateJobSyncWithDocuments (string  
sessionId, ProcessIdentity processIdentity, JobWithDocumentsInitialization2  
jobWithDocsInitialization, VariableIdentityCollection variablesToReturn)
```

- Page volume decremented based parameters to the API and the Map
 - If the parameter StoreFolderandDocuments is True then Imaging volume is decremented
 - Transformation volume is decremented per established rules
 - Imaging volume also decremented if the synchronous map contains the following:
 - Imaging Processing
 - PDF Generation
 - Extraction using only a bar code locator
 - Class and separation using a profile

In all cases Imaging volume is only decremented
once for a page.

Installing Kofax TotalAgility 7



Installing Kofax TotalAgility 7

- Pre-requisite software
- Application and Web Server
- Installation Account (Must have Admin privileges on Server)
- Service Account (used to run the TotalAgility Services and should be different than the Installation Account)
- License provided
- Pre-requisite Utility



This lab will take you through an installation on a single machine (this is not supported in a production environment)

Class Training Overview

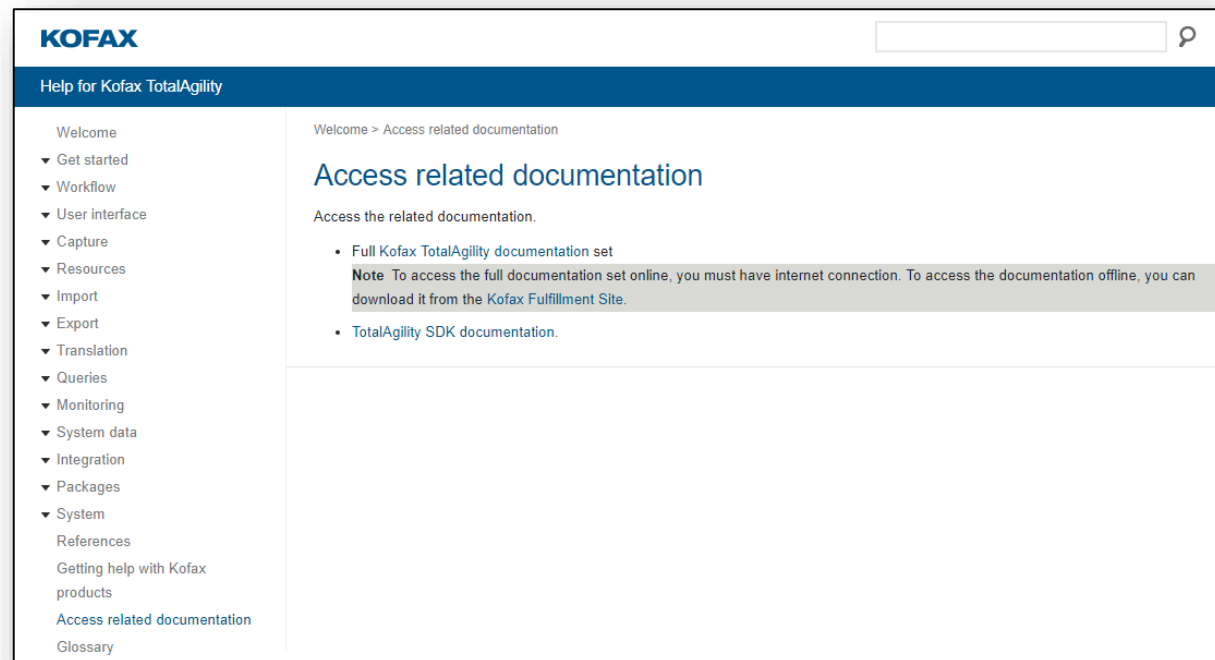


- Installation Prerequisites
 - Hardware Requirements
 - Server Operating System
 - Software Requirements
 - .NET Framework 4.7
 - Microsoft Internet Information Services (IIS)
 - Internet Browser
 - MS SQL Server
 - TCP/IP Protocol
 - Installer and Service Accounts

Installation Prerequisites – Technical Specification

■ Important Note

- You should refer to the 7.6 Pre-requisite Guide, Installation Guide, and Technical Specification documents available on the support portal for full details of supported software/systems
- You can access documentation by going to the online help in the Designer and selecting Access related documentation and selecting Full Kofax TotalAgility documentation



Installation Prerequisites – Hardware Requirements

- Hard Disk
 - Minimum of 4 GB of available hard-disk space
 - Disk space requirements will vary with the TotalAgility components you install
- Memory
 - Recommended: 8 GB or more
- Processor Type
 - x64 Processor: AMD Opteron, AMD Athlon 64, Intel Xeon with Intel EM64T support, Intel Pentium IV with EM64T support
- Processor Speed
 - x64 Processor: 2.6 GHz or faster
- Database
 - 100 MB

Installation Prerequisites – Server Operating System

- Operating System
 - Windows Server 2008 R2 (64 bit) and above
 - Note: Kofax TotalAgility supports both 32 and 64 bit machines
Note: Transformation Server only supports 64 bit machines
- Virtualization
 - Kofax TotalAgility is supported in virtual machine environments for example Hyper-V role in Windows Server 2008 SP2
 - Each virtual machine (child partition) must have sufficient processor resources, memory, and disk resources for its Kofax TotalAgility instance

Installation Prerequisites – Software Requirements



- Internet Information Services (IIS)
 - IIS v7 or later
 - Please see labs for IIS requirements (ASP.NET, Windows Authentication, Static Content, WCF HTTP Activation)
 - SSL protocol enabled, if you are using SSL
- .NET Framework 4.7 & above
- ASP.NET

Installation Prerequisites – Software Requirements (cont.)

- Internet Browser
 - The following browsers and the mobile equivalents are supported, specifically the latest version and one previous: IE11 (non enterprise mode), Edge, Firefox (latest), Chrome (latest)
 - Ensure to enable JavaScript in the internet browser
- Internet
 - To activate the license, need internet connectivity
- SQL
 - SQL 2012 and above. You must have appropriate rights to create databases
 - SQL Command Utilities and SQL Server Native Client
- Network Protocol
 - TCP/IP
- Visual C++ Packages for Visual Studio (X86 & X64)

Installation Prerequisites – Client Operating System



- Clients
 - Windows 7 (32-bit/64-bit) with SP1
 - Windows 8.1 (32-bit/64-bit)
 - Windows 10

Supported 3rd Party Products and Technologies

- Attached Scanners
 - Kofax TotalAgility 7 supports all attached scanners that support the TWAIN interface.
 - Twain support will be provided using the Atalasoft software version 10.0.2 that has EVRS 1.0 included.
 - Kofax TotalAgility 7 also supports all ISIS scanners supported by VRS
 - ISIS support will be provided by installing VRS Elite on the client machine and exposing VRS as a Twain driver

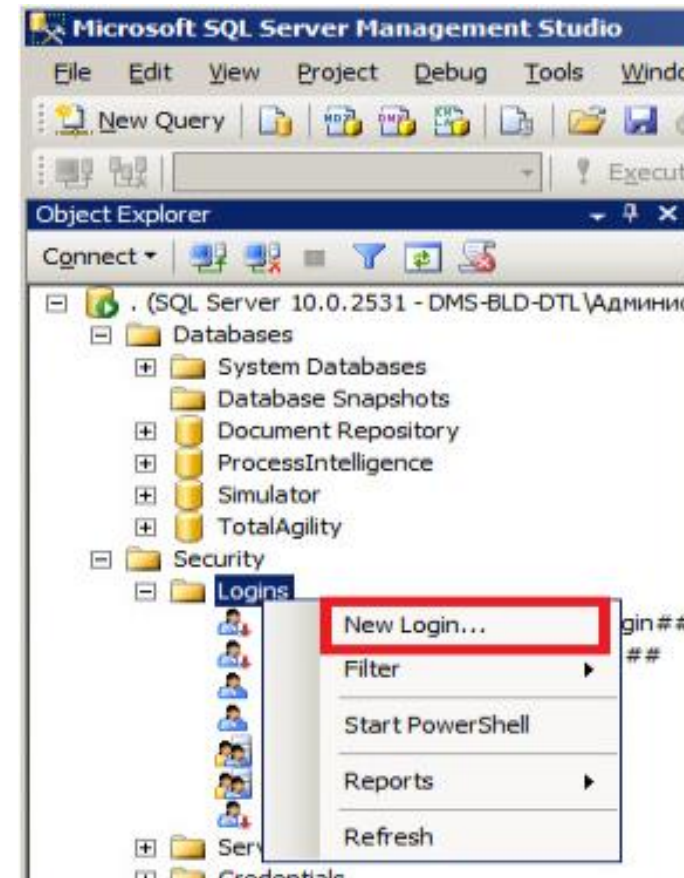
Supported 3rd Party Products and Technologies (cont.)



- Fax Servers
 - Kofax Communication Server 9.1-10.2
 - OpenText RightFax version 10.x
 - OpenText RightFax version 9.x
 - BISCOP FAXCOM Suite for Windows 09.07.xxxx

Installation Prerequisites

- Installer Account
 - Local Administrator
 - Appropriate SQL Permissions
- Service Account
 - Local Administrator
 - Appropriate SQL Permissions
 - Log on as a Service



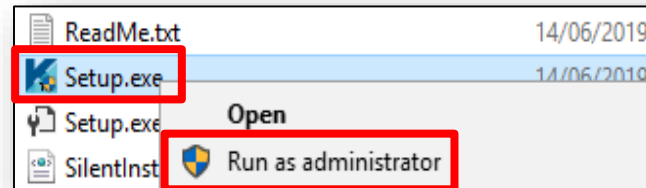
It is not mandatory to make the service account a local administrator of the server. Read the installation pre-requisites guide in the documentation, if you cannot make the service account a local administrator.

Installation Prerequisites

- Before you install Kofax TotalAgility 7, ensure that your system meets the system requirements listed in this module
- If your solution includes multiple Kofax products, review the Kofax Cross-Product Compatibility Matrix:
 - http://www.kofax.com/support/notices/Kofax_Cross_Product_Compatibility_Matrix.pdf
- Obtain a license key for Kofax TotalAgility either from your Account Manager or from Kofax Support
- To install Transformation Designer automatically with TotalAgility, copy the Transformation Designer folder into the TotalAgility folder in your install location
- You can use the Pre-requisite Utility in the installation media:
TotalAgility\Utilities\Pre-requisite Utility\Agility.Installation.Server.Prerequisites.exe

Installation Steps – Starting the Kofax TotalAgility 7 Wizard

- Start the installation wizard by right-clicking on Setup.exe in the installation folder and selecting “Run as Administrator”

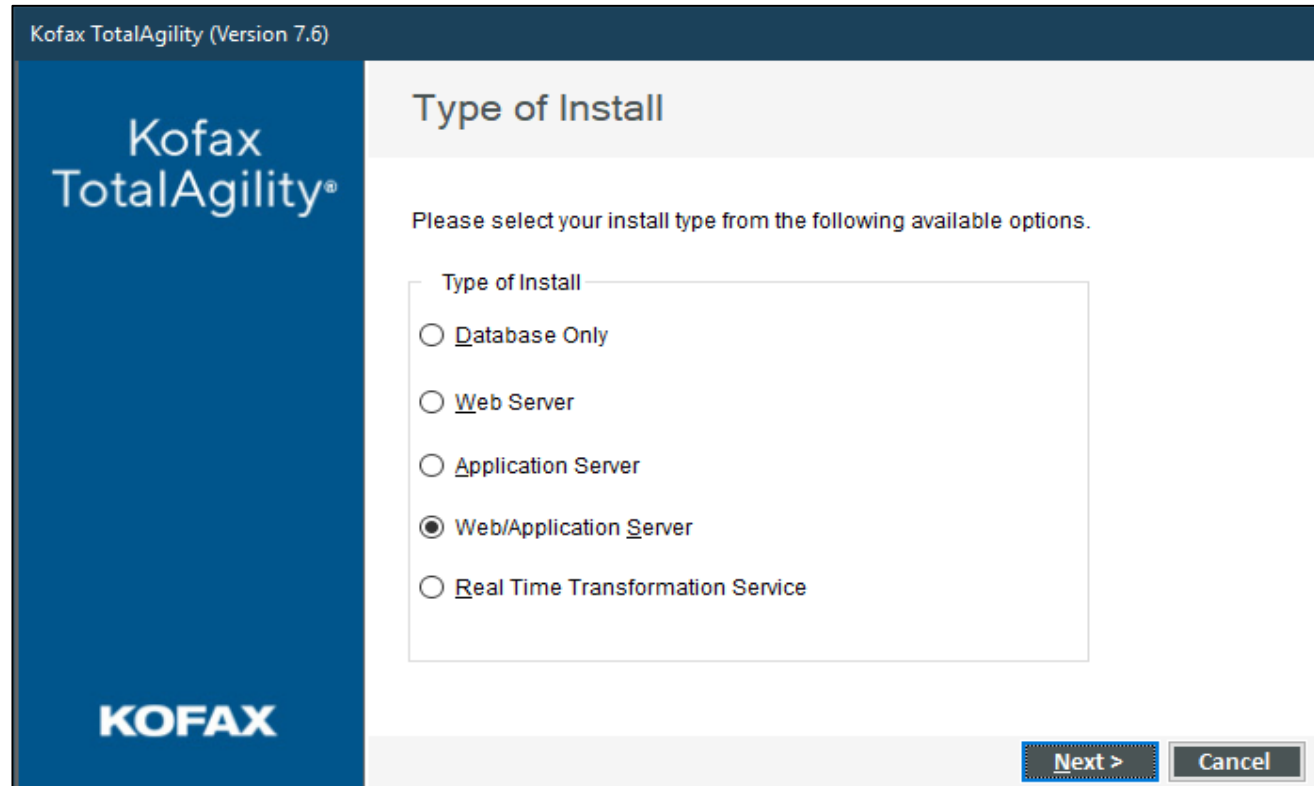


The install User must have Administrative privileges on the local machine to install Kofax TotalAgility 7

Installation Steps – License Agreement



Type of Install



Kofax TotalAgility (Version 7.6)

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Type of Install

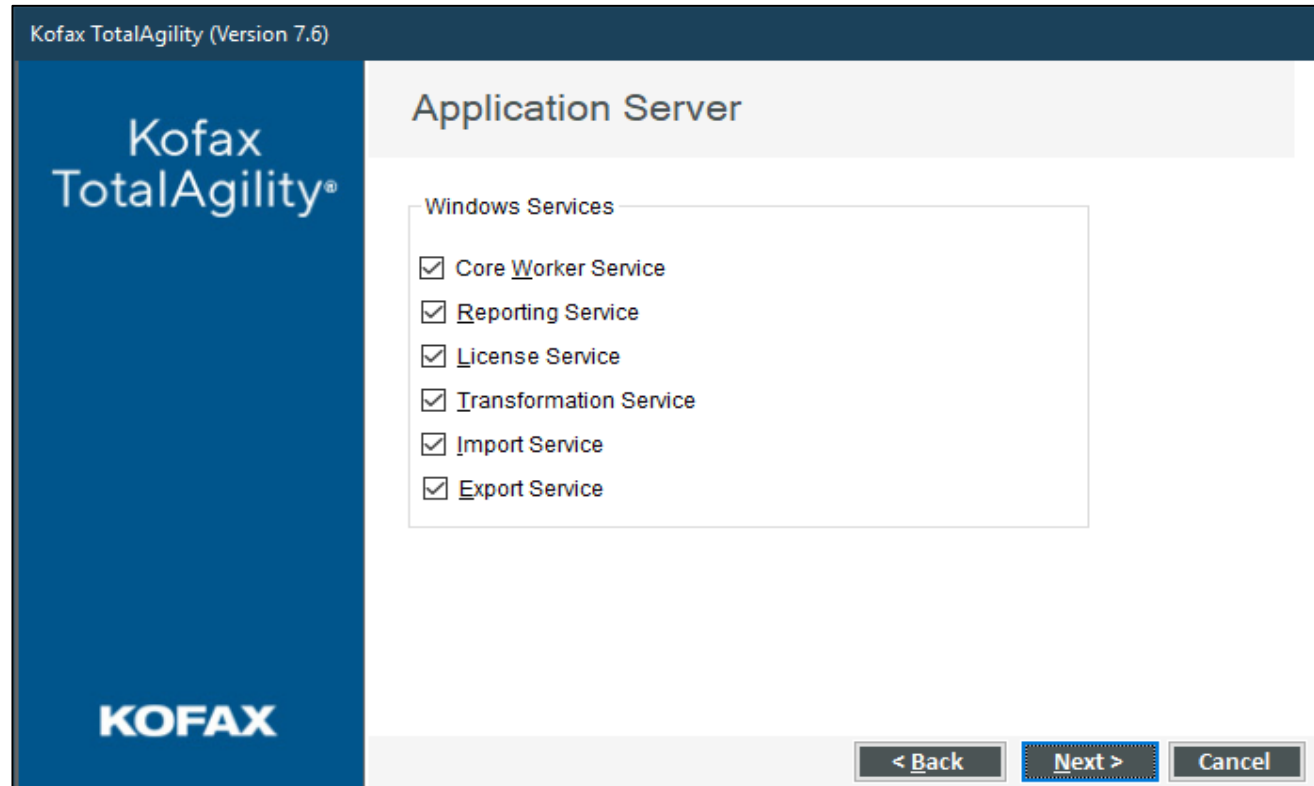
Please select your install type from the following available options.

Type of Install

- ☐ Database Only
- ☐ Web Server
- ☐ Application Server
- ☒ Web/Application Server
- ☐ Real Time Transformation Service

Next > **Cancel**

Application Server Services

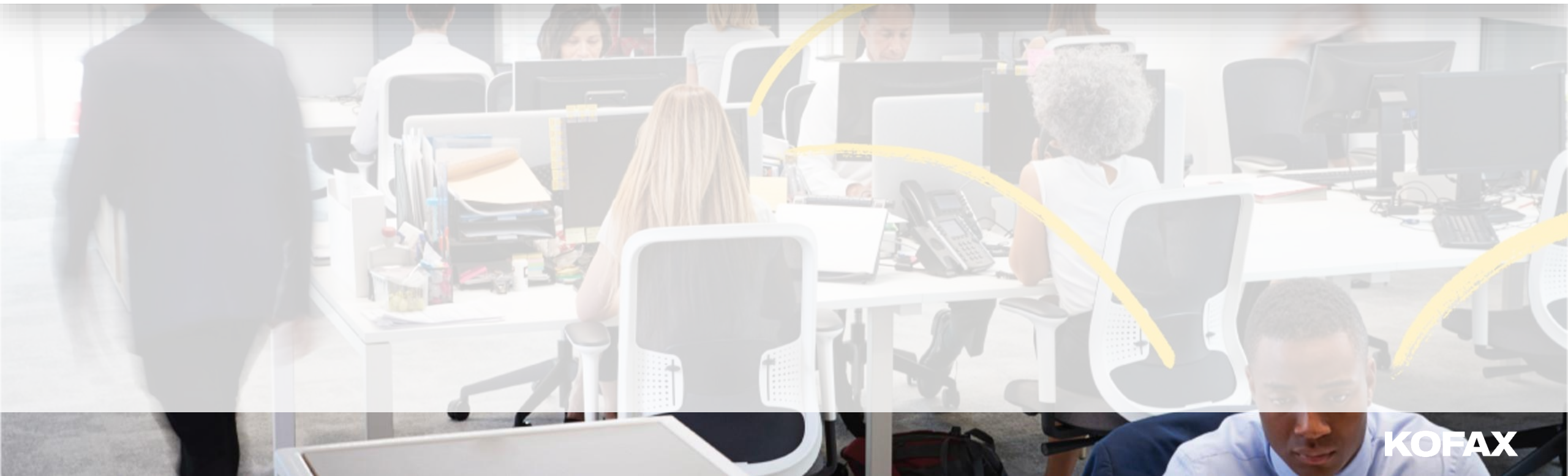


Installation Wizard

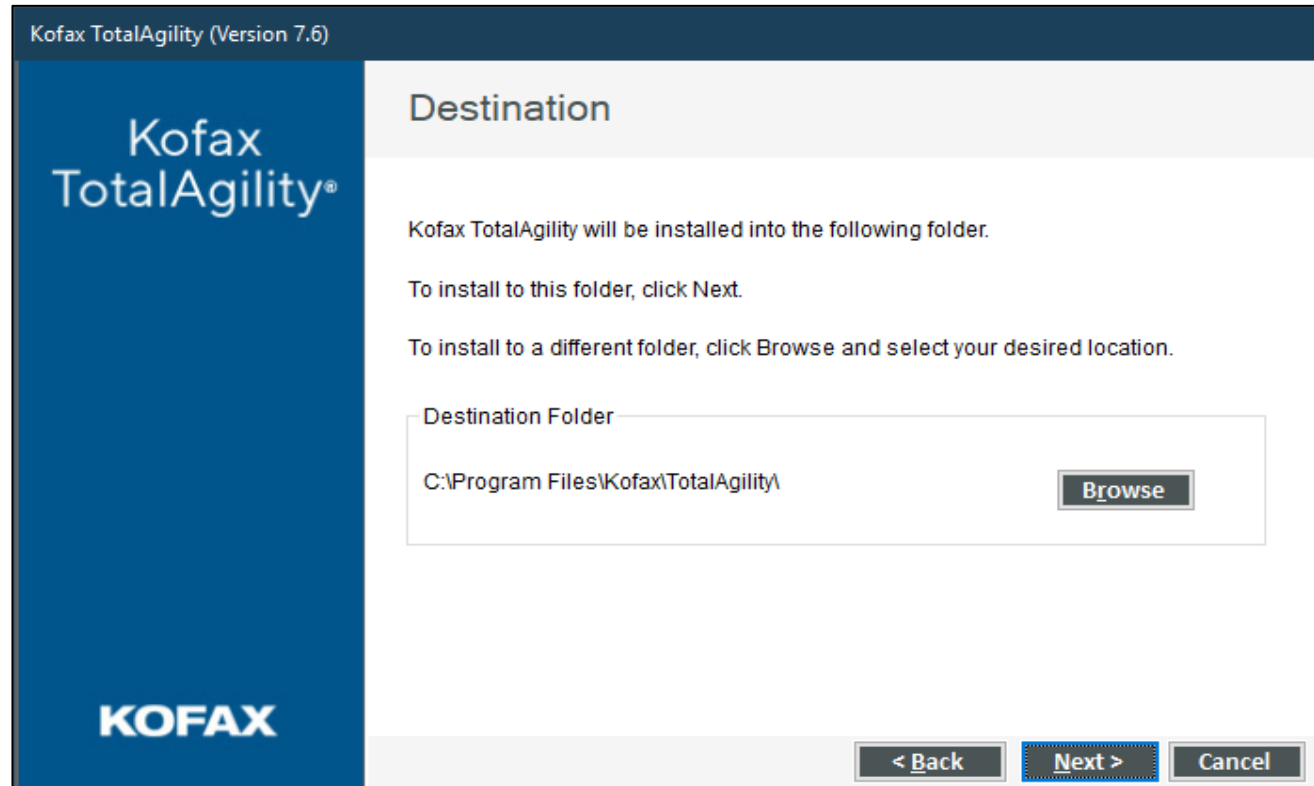


- During Lab 2 all installation screens will be walked through.

Additional Installation Slides



Destination



Service Account Credentials

Kofax TotalAgility (Version 7.6)

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Credentials

Please enter the username and password details of the Windows account to run Kofax TotalAgility on.

Account

Username: KTA-TRAIN\KTAService

Password:

Confirm:

Root Website to host TotalAgility Application

Default Web Site

Please configure the HTTPS bindings in IIS to Enable SSL

☒ Support SSL

☒ Windows Authentication

< Back Next > Cancel

Support SSL (if required)

Installation Steps - Databases

Kofax TotalAgility (Version 7.6)

Kofax TotalAgility®

Databases

☒ Install Databases ☐ Overwrite databases if they exist?

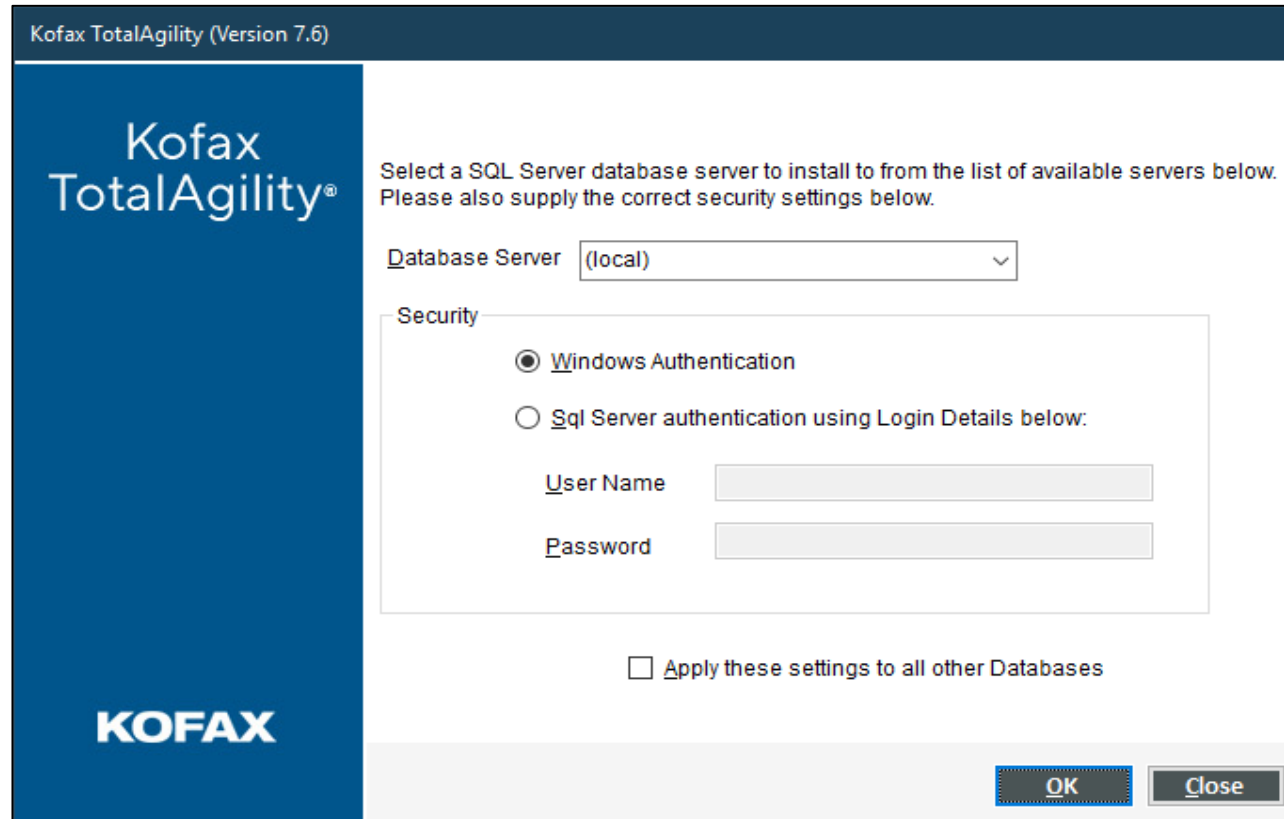
	Database Name	Server
<u>M</u> ain	TotalAgility	... (local)
<u>A</u> udit	TotalAgility_Audit	... (local)
<u>F</u> inished Jobs	TotalAgility_Archive	... (local)
<u>S</u> imulator	TotalAgility_Simulator	... (local)
<u>D</u> ata Layer	TotalAgility_Documents	... (local)
<u>R</u> eporting	TotalAgility_Reporting	... (local)
<u>S</u> taging	TotalAgility_Reporting_Staging	... (local)

KOFAX

< Back Next > Cancel

Click on the ellipsis to select the server

Installation Steps – Security Settings



Kofax TotalAgility (Version 7.6)

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Select a SQL Server database server to install to from the list of available servers below. Please also supply the correct security settings below.

Database Server: (local) ▼

Security

☒ Windows Authentication

☐ SQL Server authentication using Login Details below:

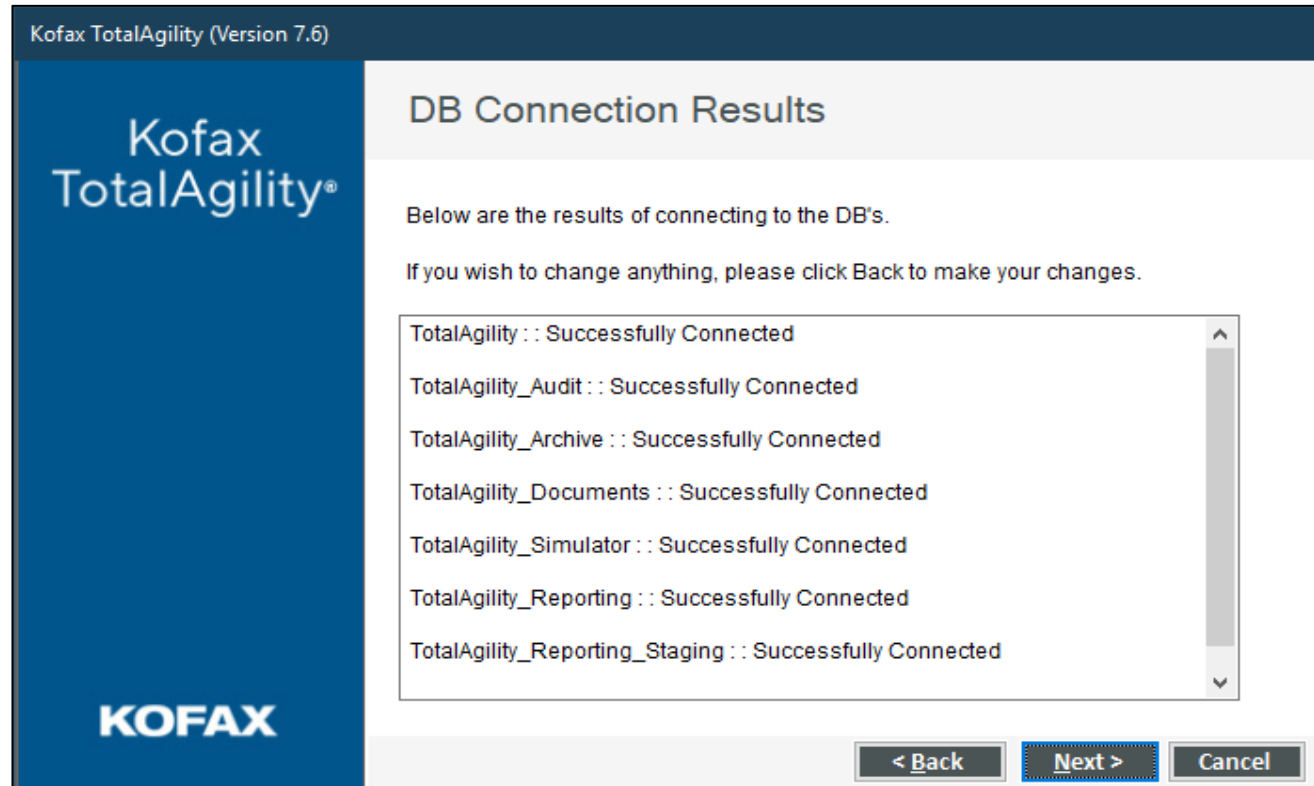
User Name:

Password:

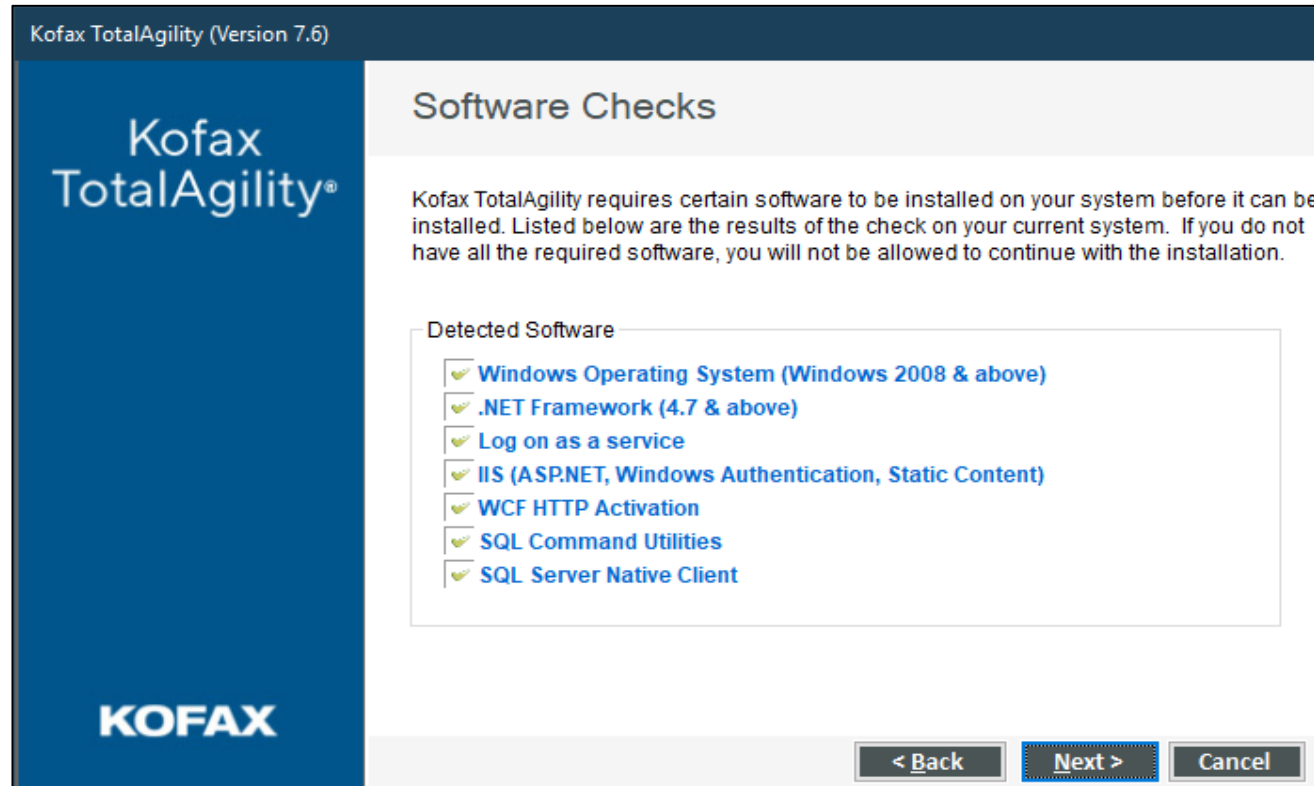
☐ Apply these settings to all other Databases

OK Close

Installation Steps – DB Connection Results



Installation Steps – Software Checks



TotalAgility Resource Credentials

Kofax TotalAgility (Version 7.6)

Kofax TotalAgility®

Kofax TotalAgility Resource Credentials

Please provide a password for this resource to use to logon to Kofax TotalAgility

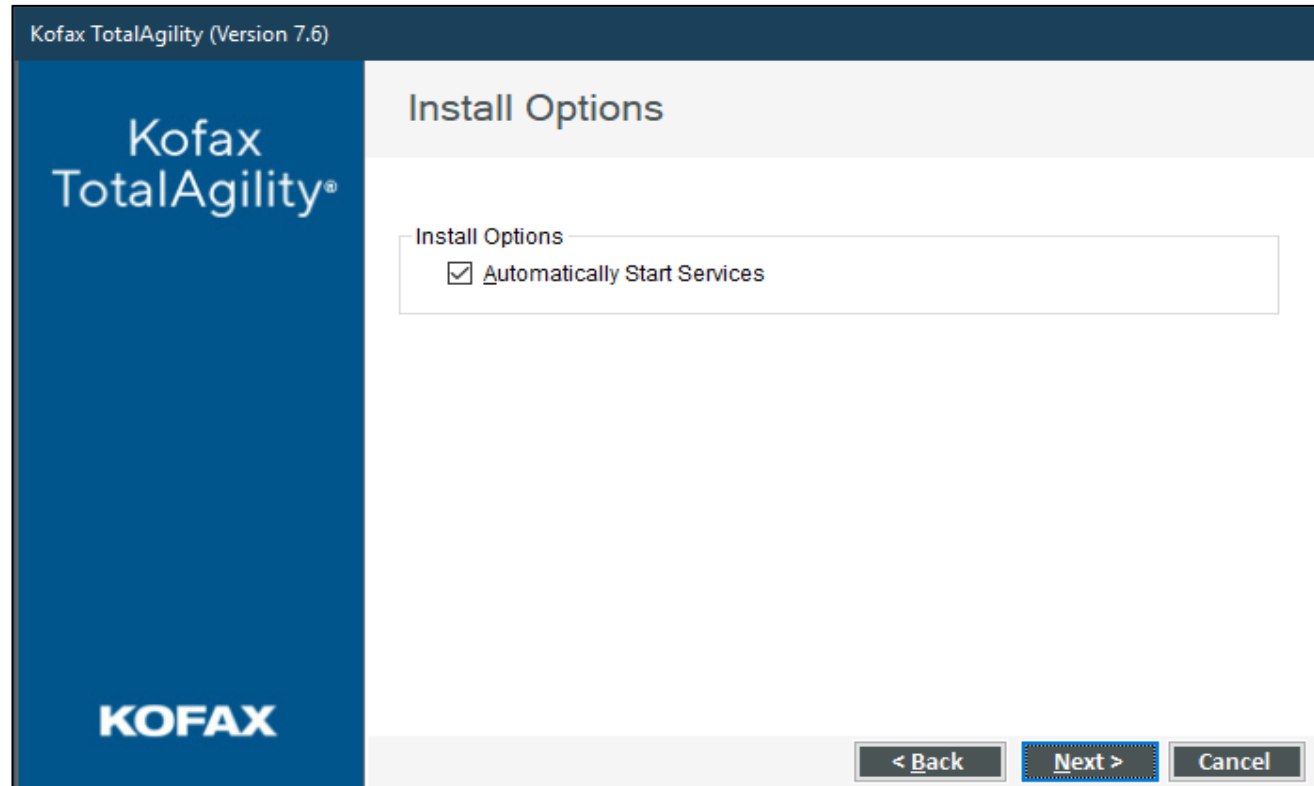
Credentials

Username

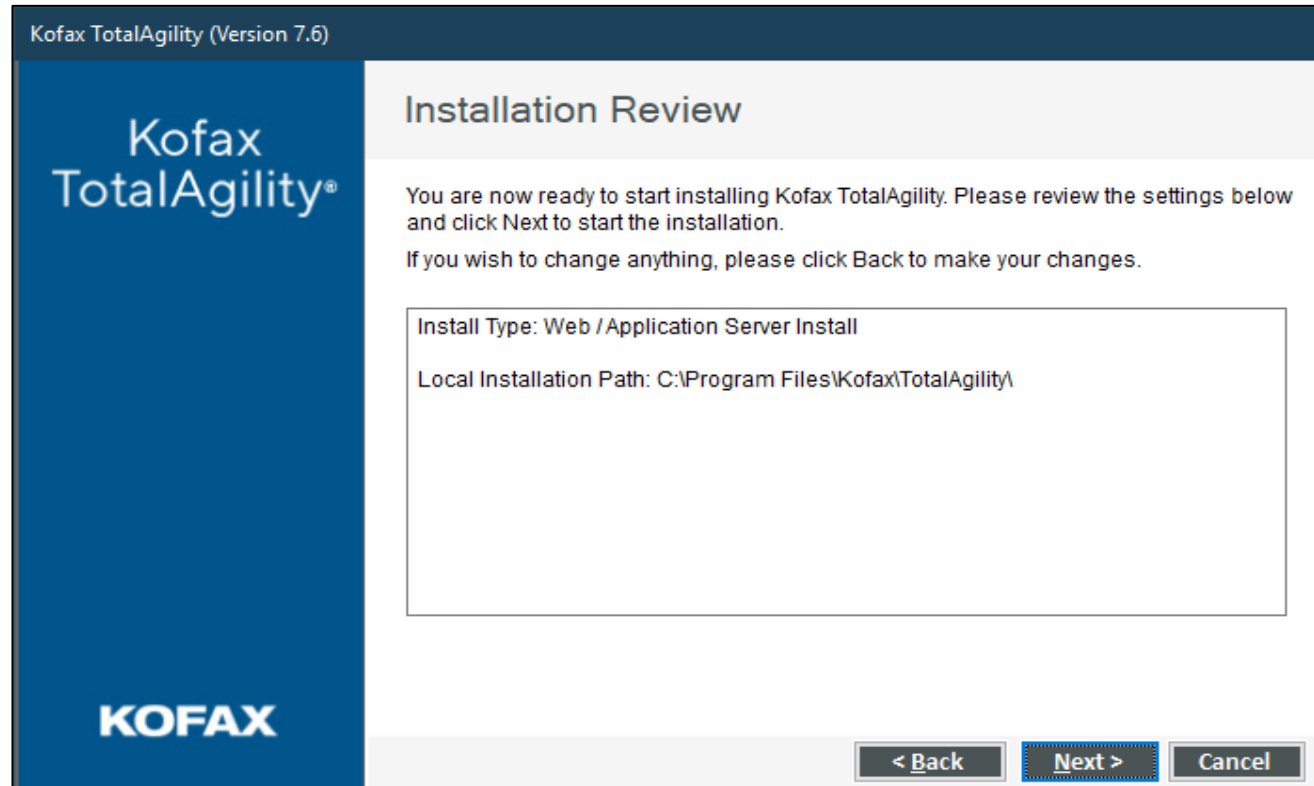
Password

Confirm

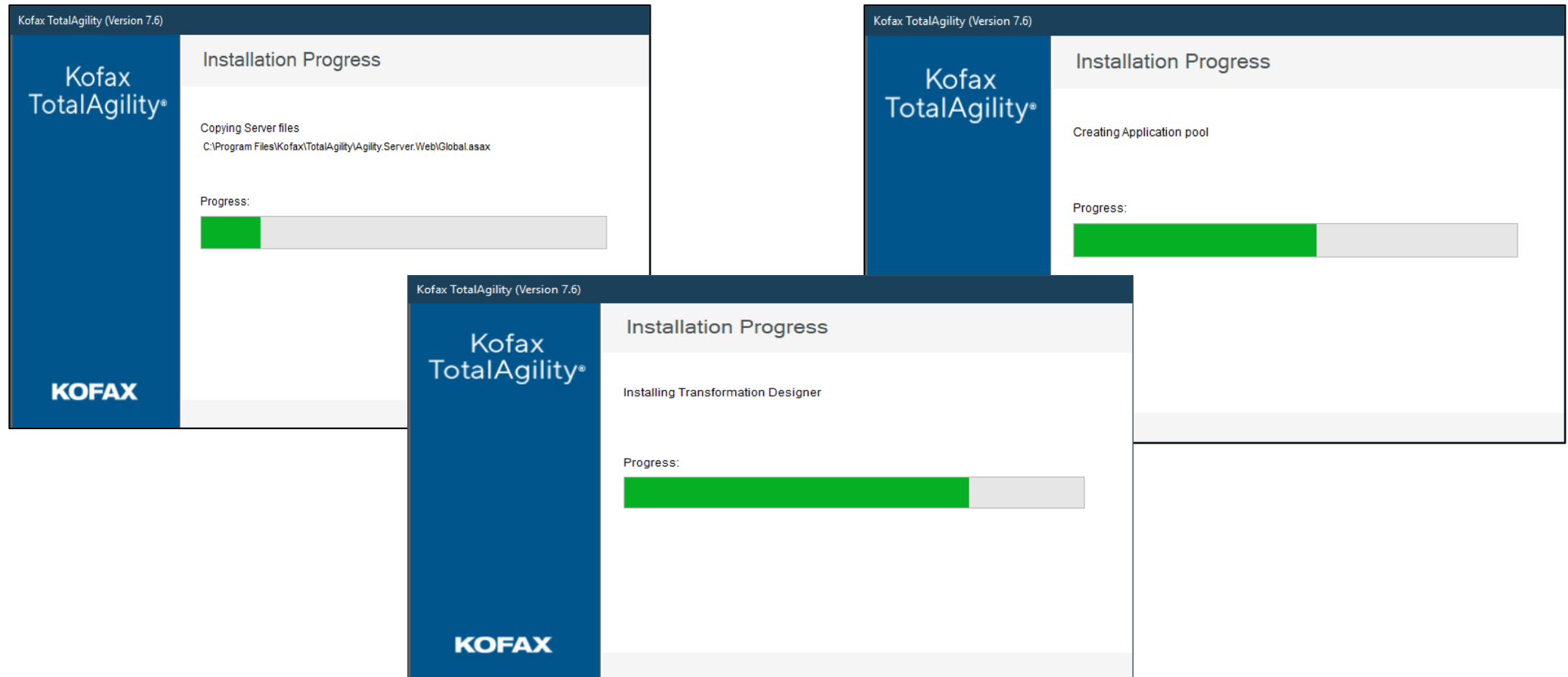
Installation Steps – Import System Maps



Installation Steps – Installation Review



Installation Steps – Copying Server Files etc.



Installation Steps - Licensing

Kofax TotalAgility (Version 7.6)

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Licensing

Enter valid IP address or server name and the port number of your license server

License Server

Port Number

Next > **Skip**

Installation Steps – Licensing (cont.)

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Licensing

For Software Activation, enter your Kofax Serial Number and Product Code

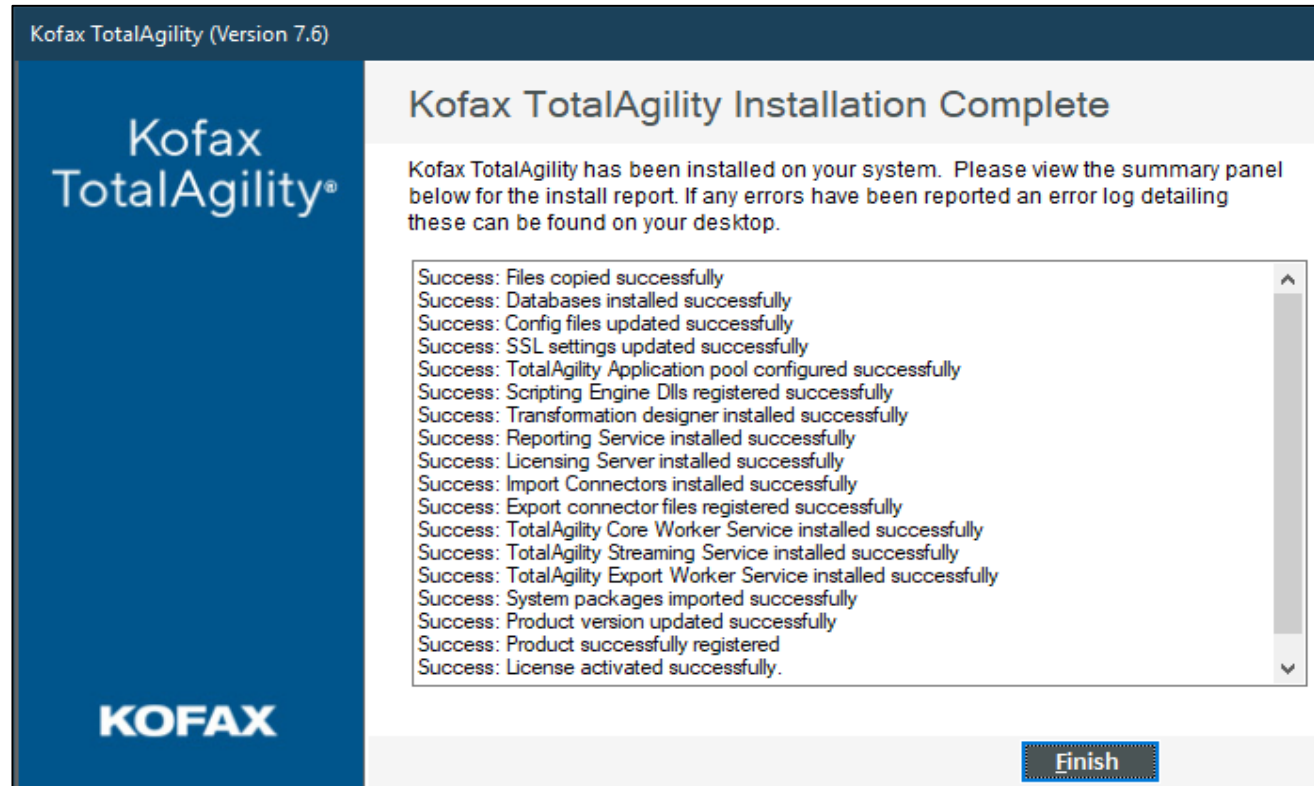
Serial Number

Product Code

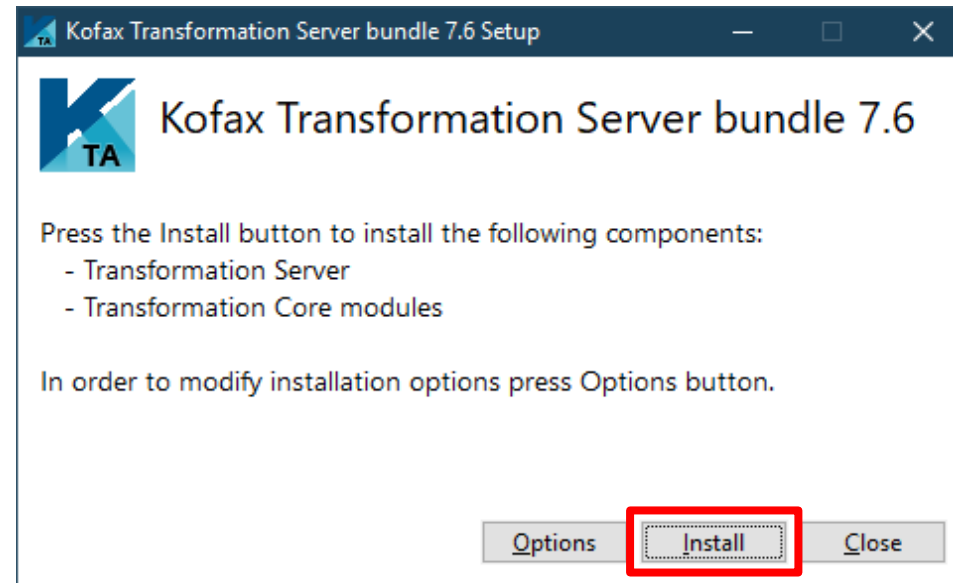
Machine ID

< Back Automatic Manual... Skip

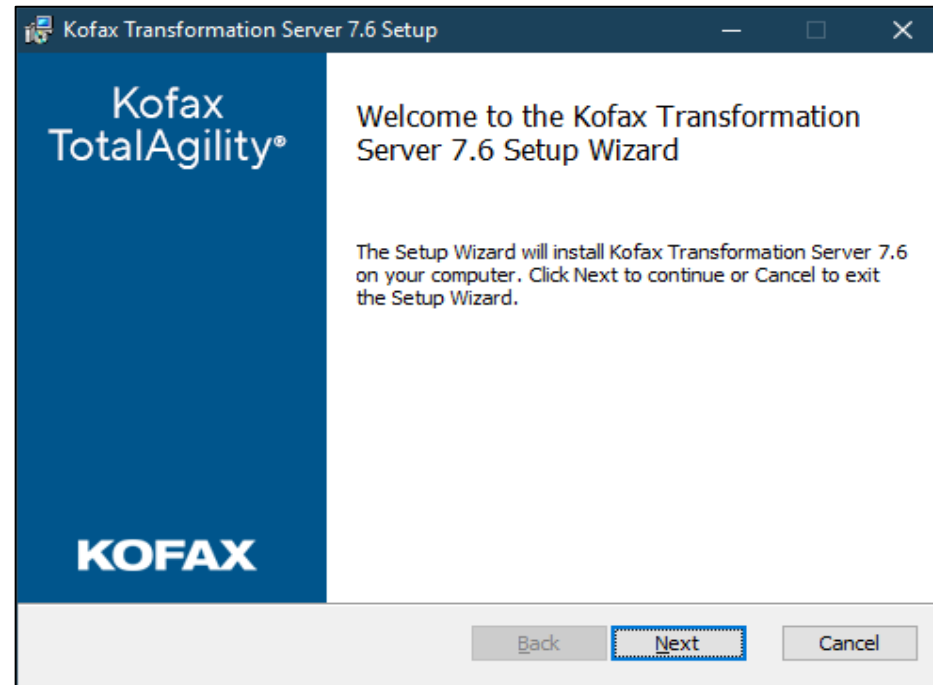
Installation Steps – Kofax TotalAgility Installation Complete



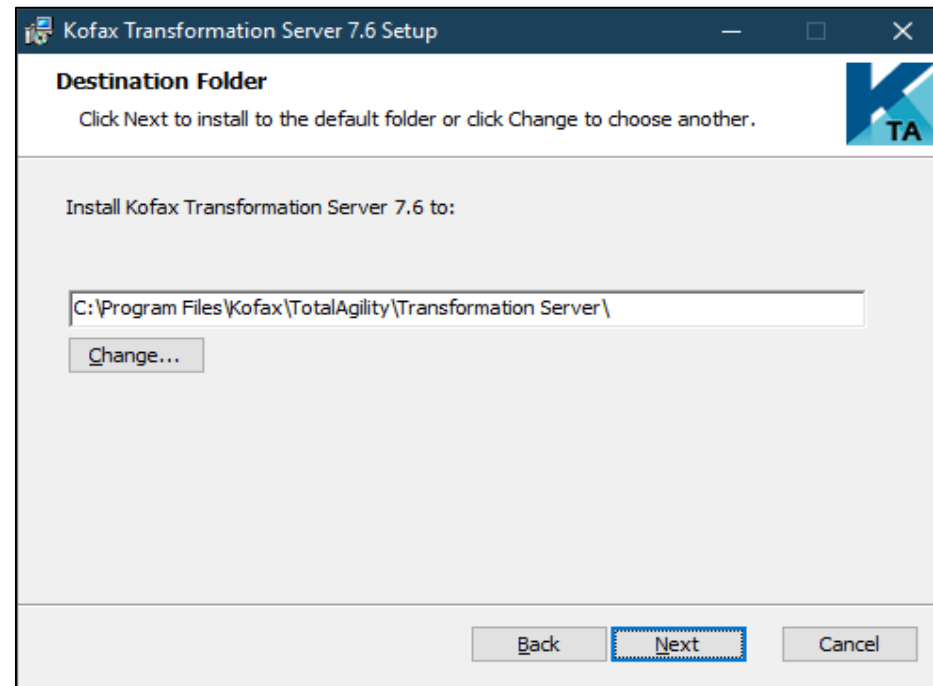
Installation Steps – Installing Transformation Server



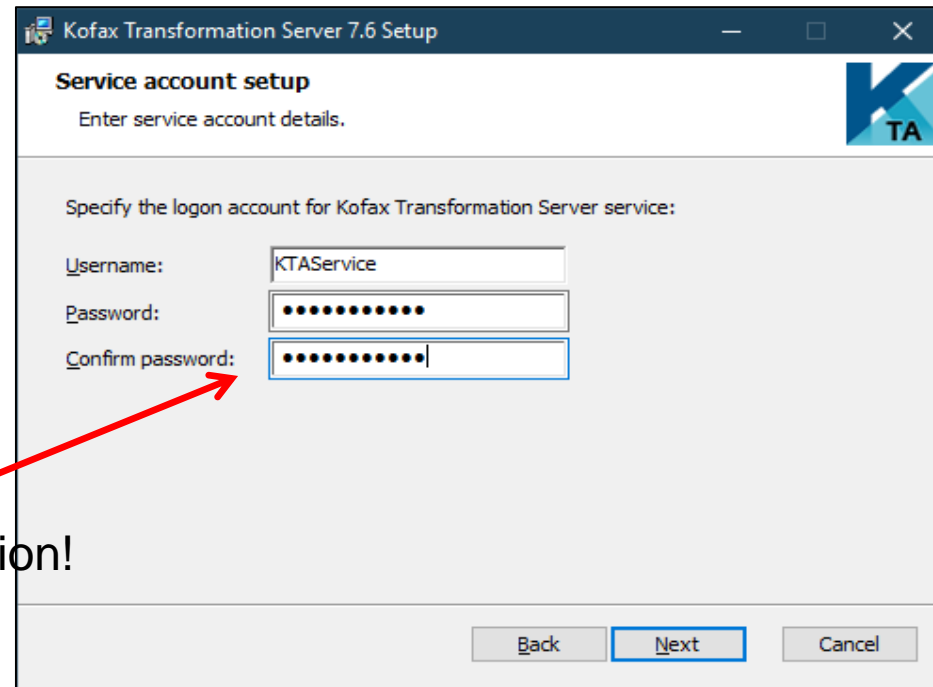
Installation Steps – Transformation Server Setup Wizard



Installation Steps – Transformation Server Destination Folder



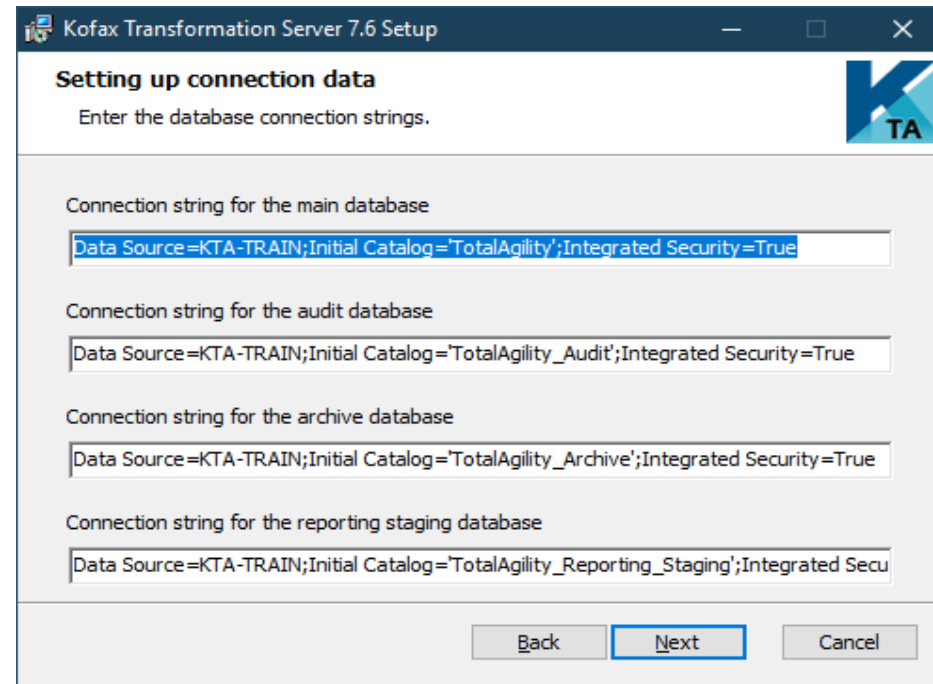
Installation Steps – Transformation Server Logon Account



The screenshot shows the 'Kofax Transformation Server 7.6 Setup' window. The title bar includes the application icon, name, and standard window controls. The main content area is titled 'Service account setup' with the instruction 'Enter service account details.' and a Kofax logo. Below this, it says 'Specify the logon account for Kofax Transformation Server service:'. There are three input fields: 'Username:' containing 'KTAService', 'Password:' with masked characters, and 'Confirm password:' also with masked characters. A red arrow points from the text 'Password = W0rkstation!' to the 'Confirm password:' field. At the bottom, there are 'Back', 'Next', and 'Cancel' buttons, with 'Next' being the active button.

Password = W0rkstation!

Installation Steps – Configuration Settings – TotalAgility Server Service



Kofax Transformation Server 7.6 Setup

Setting up connection data
Enter the database connection strings.

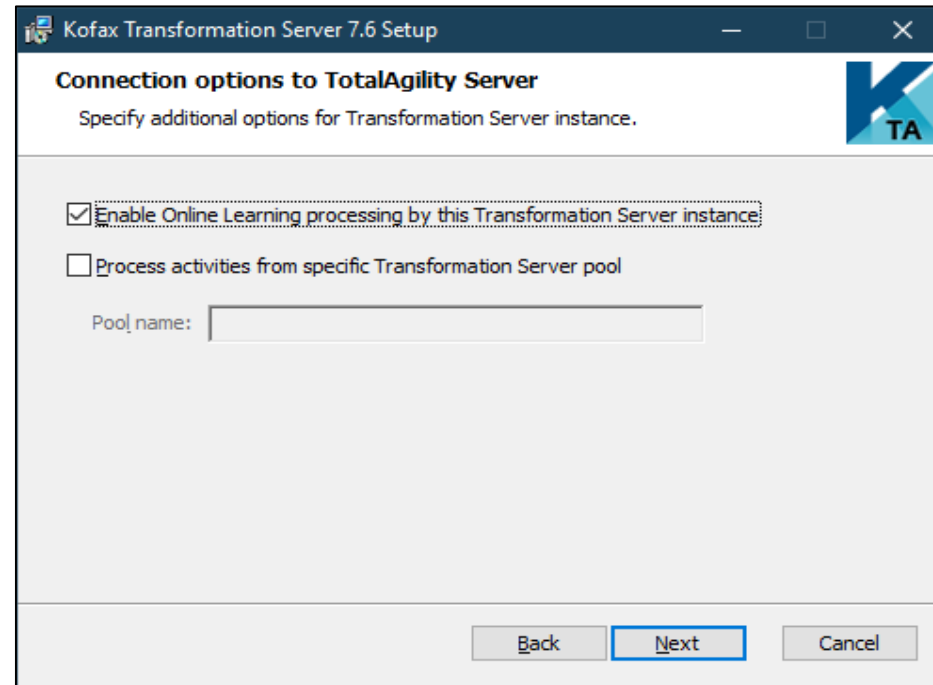
Connection string for the main database
`Data Source=KTA-TRAIN;Initial Catalog='TotalAgility';Integrated Security=True`

Connection string for the audit database
`Data Source=KTA-TRAIN;Initial Catalog='TotalAgility_Audit';Integrated Security=True`

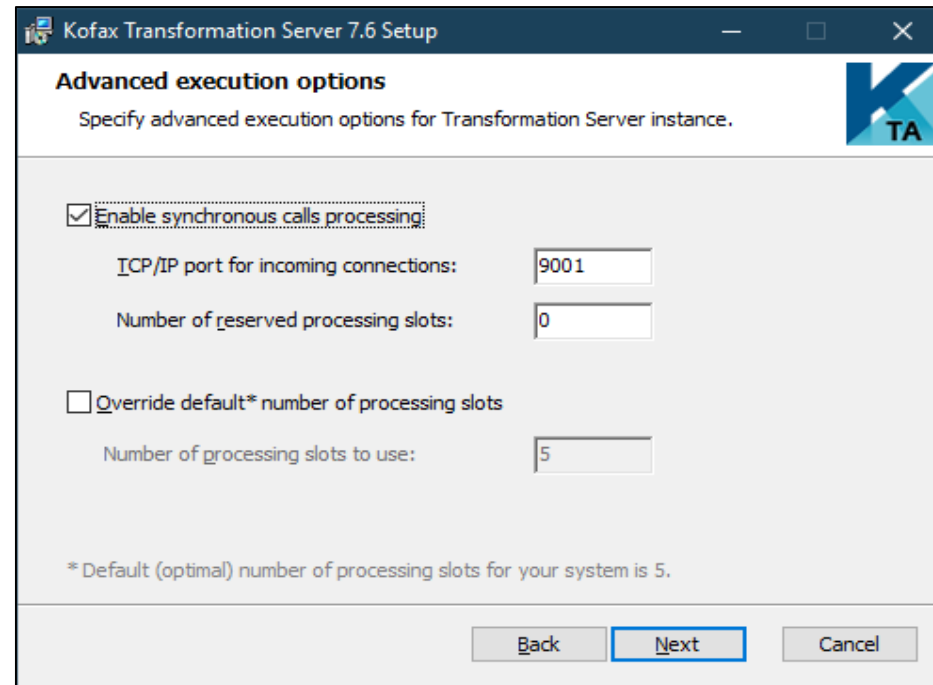
Connection string for the archive database
`Data Source=KTA-TRAIN;Initial Catalog='TotalAgility_Archive';Integrated Security=True`

Connection string for the reporting staging database
`Data Source=KTA-TRAIN;Initial Catalog='TotalAgility_Reporting_Staging';Integrated Security=True`

Installation Steps – Transformation Server Connection Options



Installation Steps – Transformation Server Advanced Execution Options



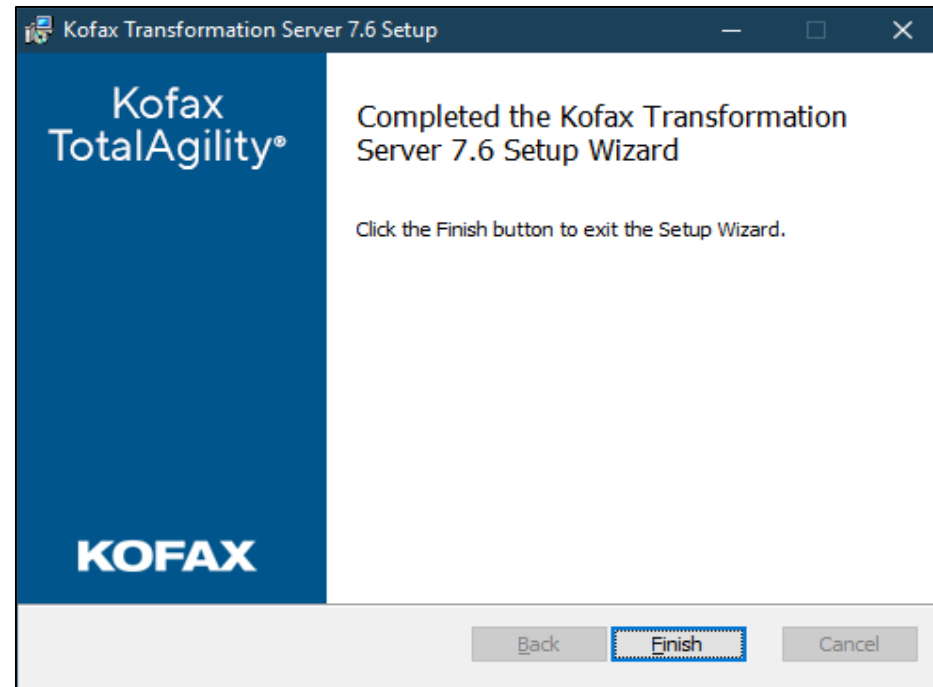
The screenshot shows the 'Kofax Transformation Server 7.6 Setup' window. The title bar includes the application icon, the text 'Kofax Transformation Server 7.6 Setup', and standard window controls. The main window has a dark blue header with the text 'Advanced execution options' and a subtitle 'Specify advanced execution options for Transformation Server instance.' on the left, and a 'K TA' logo on the right. The main content area is light gray and contains the following options:

- ☒ **Enable synchronous calls processing:**
 - ICP/IP port for incoming connections:
 - Number of reserved processing slots:
- ☐ **Override default* number of processing slots**
 - Number of processing slots to use:

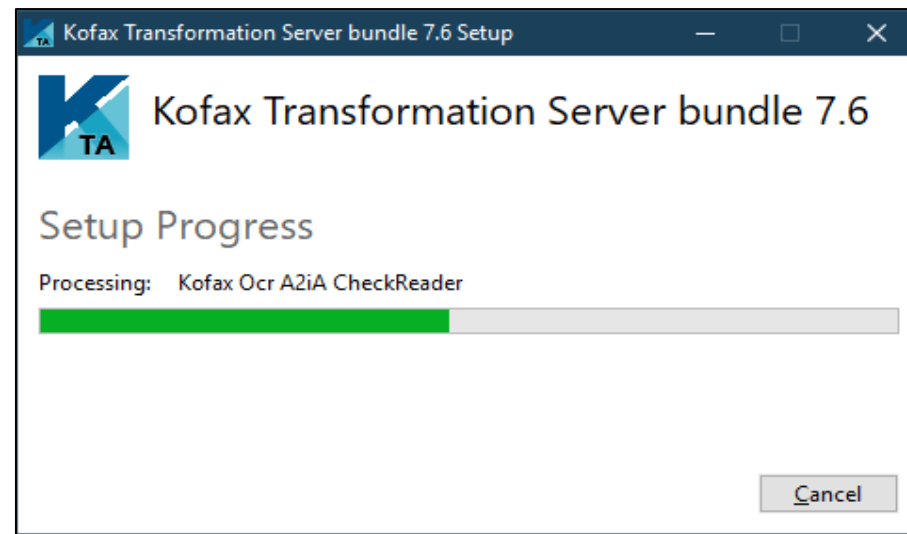
At the bottom of the main area, a note states: '* Default (optimal) number of processing slots for your system is 5.'

The bottom of the window features three buttons: 'Back', 'Next' (which is highlighted with a blue border), and 'Cancel'.

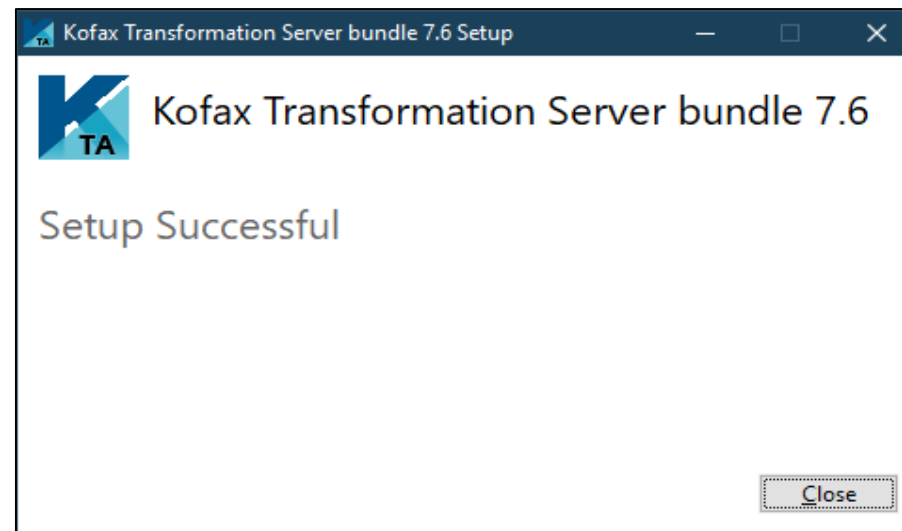
Installation Steps - Finish



Installation Steps – Transformation Server bundle – Copying Files

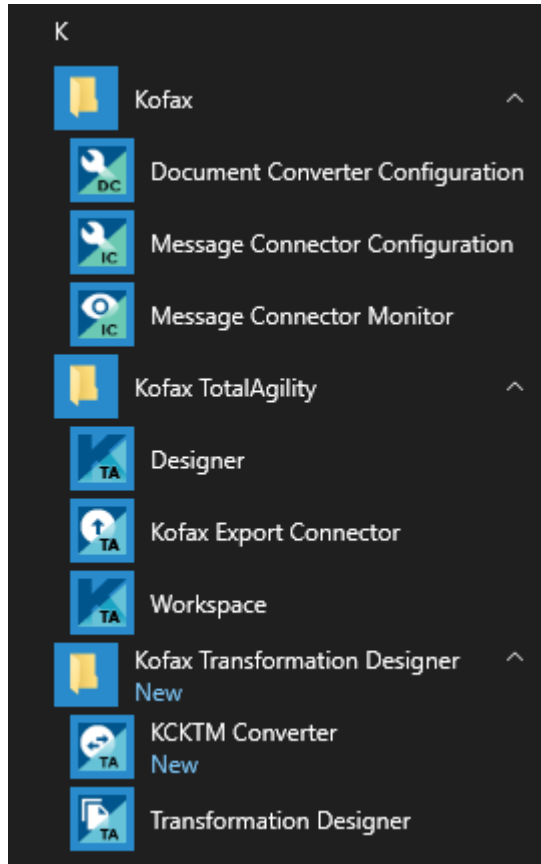


Installation Steps – Transformation Server bundle Setup Complete



Confirming Services and Applications After Installation

- You can pin the apps to your Start menu or Task Bar



	Kofax License Server	Licensing for Kofax Pro...	Running	Automatic	Local System
	Kofax Message Connector	Provides fax, email, fold...	Running	Automatic	Local System
	Kofax TotalAgility Core Worker	Performs automatic act...	Running	Automatic	.\KTAService
	Kofax TotalAgility Export Worker	Performs Export connec...	Running	Automatic	.\KTAService
	Kofax TotalAgility Reporting Server	Kofax TotalAgility Repo...	Running	Automatic	.\KTAService
	Kofax TotalAgility Streaming Service	Hosts the streaming ser...	Running	Automatic	.\KTAService
	Kofax Transformation Server	Kofax Transformation S...	Running	Automatic	.\KTAService

Name	Status	.NET CLR V...	Managed Pipel...	Identity	Applications
.NET v4.5	Started	v4.0	Integrated	ApplicationPoolIdentity	0
.NET v4.5 Classic	Started	v4.0	Classic	ApplicationPoolIdentity	0
DefaultAppPool	Started	v4.0	Integrated	ApplicationPoolIdentity	2
TotalAgilityAppPool	Started	v4.0	Integrated	KTA-TRAIN\KTAService	1

Testing Kofax TotalAgility Designer

The screenshot shows the Kofax TotalAgility Designer web application. The top header features the Kofax logo and the text "TotalAgility Designer" on the left, and a user profile icon labeled "Trainee" with a help icon on the right. A dark sidebar on the left contains a navigation menu with icons and labels for: Home, Workflow, User interface, Capture, Resources, Import..., Export..., Translation..., Queries, Monitoring, System data, Integration, Packages, and System. The main content area has a "Welcome Trainee" heading with a Kofax TotalAgility logo. Below this, there are six links arranged in two columns: "Design a process", "Design a form", "Design a case", "Design an extraction group", "Design a business rule", and "Design a folder". Each link is followed by a brief description of its function. At the bottom right of the main area, there is a link "View recent items" next to a checkbox labeled "Don't show this page next time", and a footer link "Click here to learn more and get started with TotalAgility".

KOFAX TotalAgility Designer

Trainee ?

Welcome Trainee

[Design a process](#)
Design a process to automate a logical flow of activities that must be completed.

[Design a form](#)
Design a form to provide a user interface to support your application.

[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 an extraction group](#)
Design an extraction group to classify and extract data from documents.

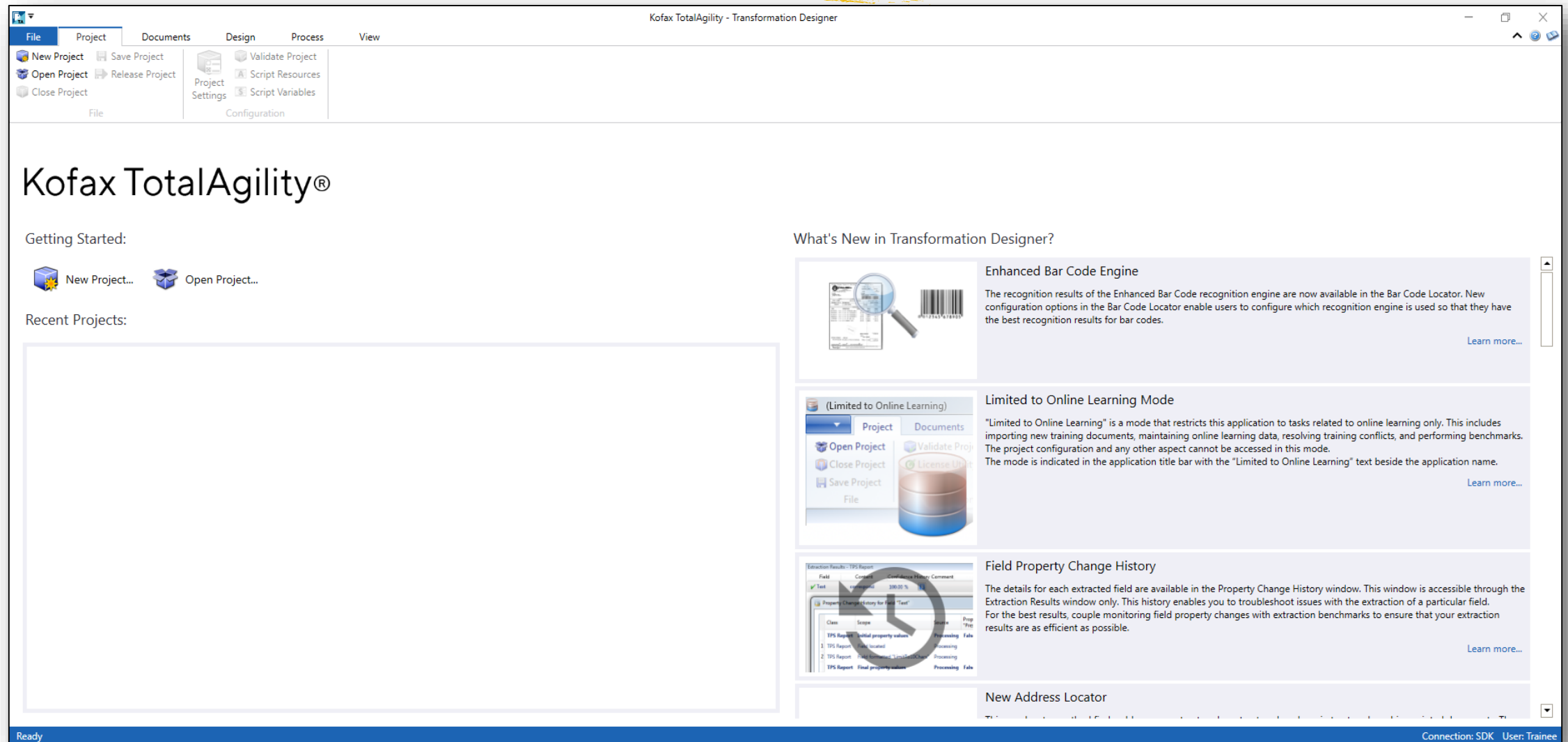
[Design a business rule](#)
Design a business rule to build complex business logic without programming to automate and optimize business decisions.

[Design a folder](#)
Design a folder to process a set of documents as a group and track data that applies to all documents.

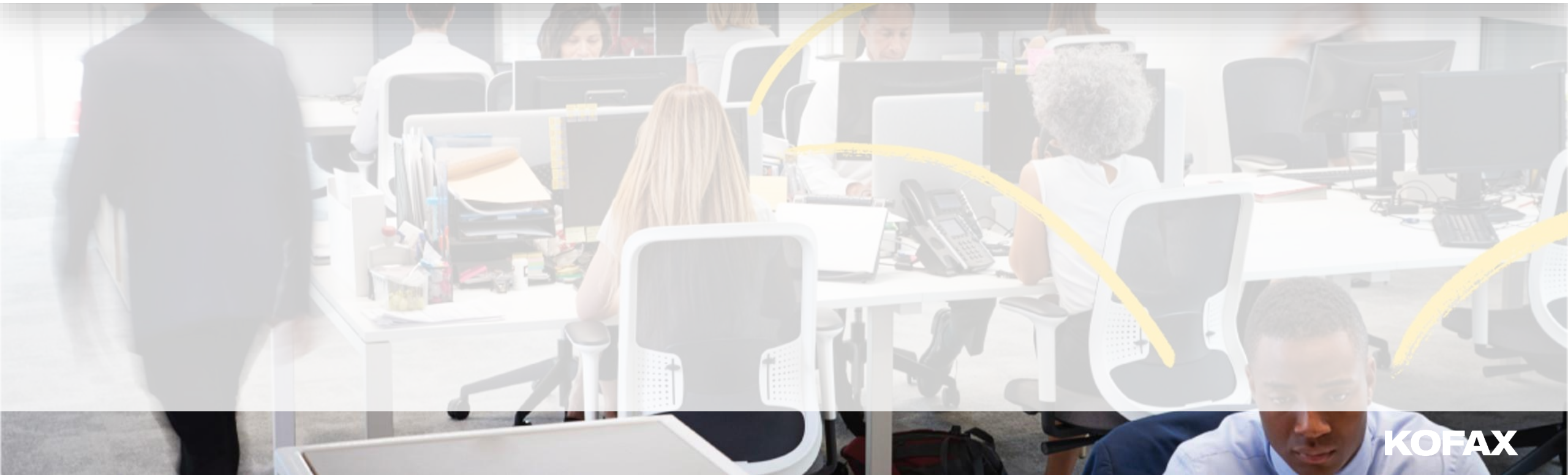
[View recent items](#) ☐ Don't show this page next time

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

Testing Kofax Transformation Designer



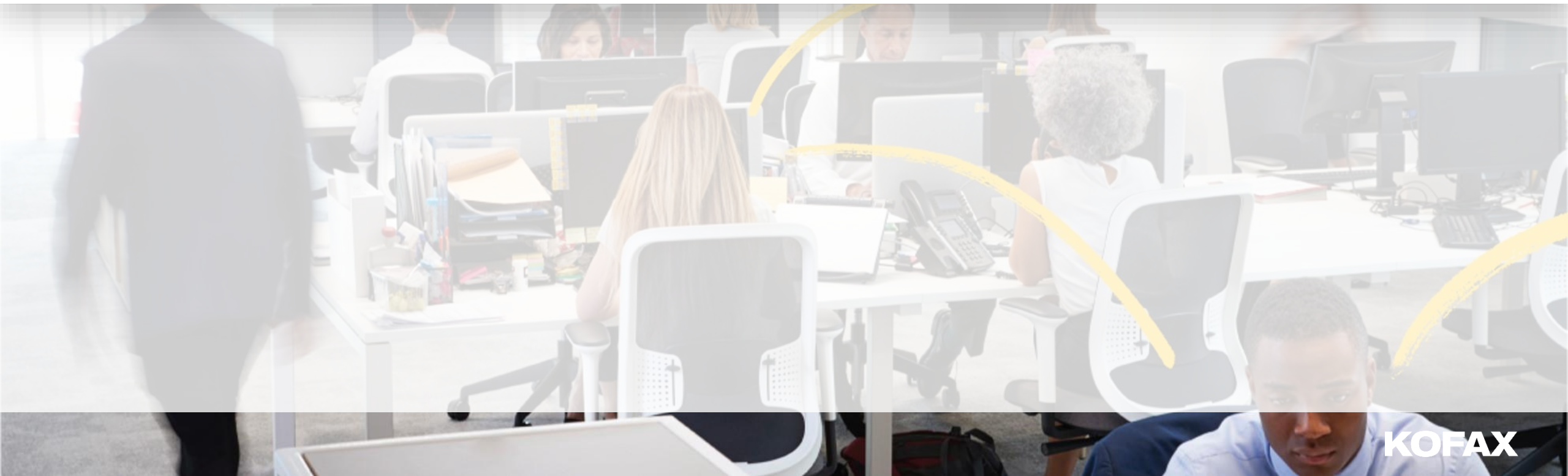
Repair/Uninstall Service Pack/Hotfix



Repair/Uninstall TotalAgility

- You can repair a TotalAgility installation by using the Uninstall/Change option in Control Panel
- You can uninstall a service pack/hotfix by using the View installed updates option in Control Panel

Configuration Editor Utility



Configuration Editor

- After installing KTA it is sometimes necessary to manually edit the config files to update settings
- In order to make this easier a configuration editor utility is provided which gives user interface to view and edit settings
 - The most commonly changed settings are available in the UI
 - Common settings (e.g. connection strings, authentication protocol) can be changed once and applied to multiple config files
 - This leads to more controlled updates and less mistakes



Manually editing the configuration files is still supported

Configuration Editor

- KTA has multiple configuration files, these vary depending on the installation type and services installed
 - Web.config
 - Agility.Server.Core.WorkerService.exe.config
 - Kofax.CEBPM.CPUService.ServiceHost.exe.config
 - Kofax.CEBPM.Reporting.TAService.exe.config
 - Agility.Server.StreamingService.exe.config
 - Agility.Server.Core.ExportService.exe.config
 - Agility.Server.Core.Executor.exe.config

Configuration Editor

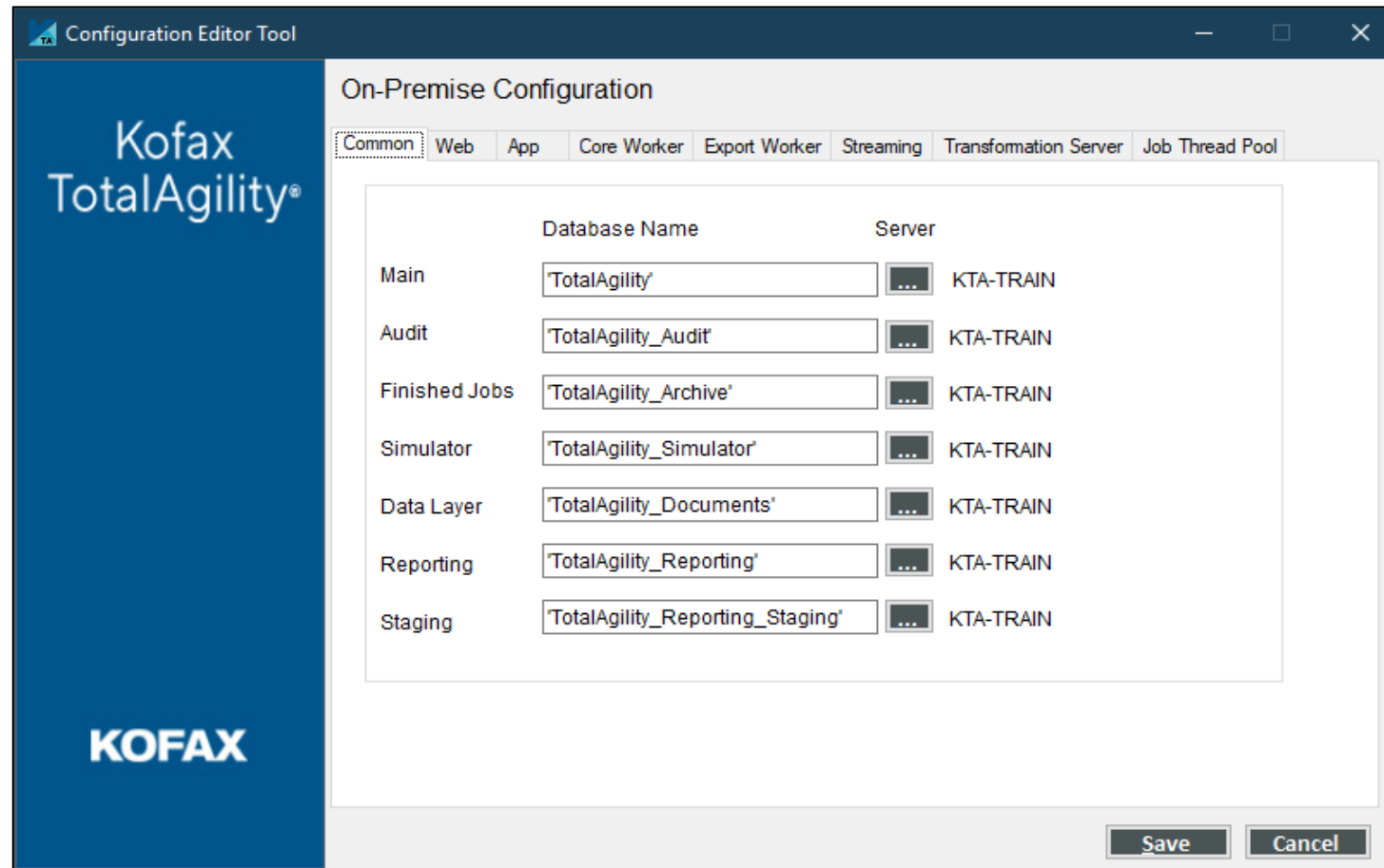
- The utility can be found in the installation media in the following folder:
TotalAgility\Utilities\ConfigurationUtility
- The executable is called KTAConfigurationUtility.exe
- This utility will not be installed as part of the Installation
- The folder with the utility will need to be manually copied onto each server where configuration settings are to be modified.
- A guide which explains the usage and all the settings is available online via the online help

Configuration Editor



- Information is grouped by tabs.
- These tabs will be visible dependent on the following:
 - The type of installation –
 - On Premise (OP)
 - On Premise Multi-Tenancy (OPMT)
 - Integration Server (IS)
 - Transformation Server Only
 - RTTS
 - Reporting
 - The items installed on the server

Configuration Editor - Screenshot



Configuration Editor - Launch

- When the configuration utility is launched, it checks that:
 - The user has sufficient database privileges
 - The user has r/w access to the configuration files
 - If any Kofax services are running
 - They will be given the option to use Docker and then to stop all services automatically, or they can stop them manually. The user can proceed regardless of the services states

Configuration Editor - Saving

- When the user saves a configuration, the utility will:
 - Notify them that the new settings will not take effect until services have been restarted
 - Provide the option to restart these services automatically, or the user can opt to restart them manually
 - Notify them that the new settings will not take effect until an app pool restart has been performed