

Kofax TotalAgility 7 Essentials

Work Like Tomorrow.™

KOFAX

instructor@kofax.com or training@kofax.com

Introduction to the Kofax TotalAgility 7 Essentials Course



Class Training Overview



- Course Structure
- Classroom Environment
- Course Materials, Software, and Hardware
- Course Goal
- Course Roadmap
- Exam

The KOFAX logo is displayed in a bold, blue, sans-serif font.

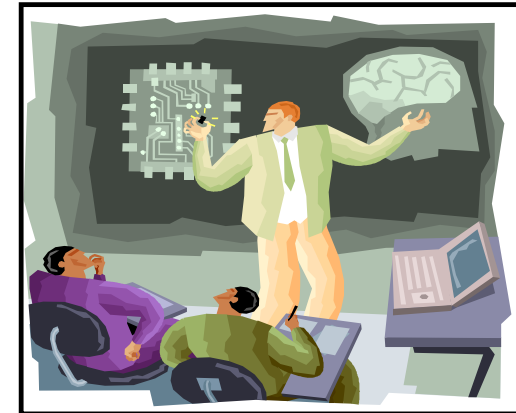
Course Structure

- Presentations
- Demonstrations
- Hands-On Practice Labs
- Topic Q&A & Daily Review



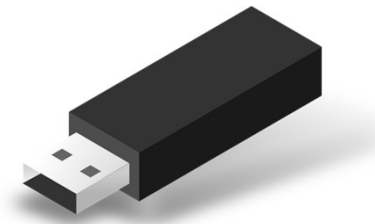
Classroom Environment

- Amenities & Fire Exits (Classroom Only)
- Four Days (optional 5th day am for exam)
- Daily Schedule
 - Start 08:30
 - Break 10:00 – 10:15
 - Lunch 12:00 – 13:00
 - Break 15:00 – 15:15
 - End 16:30
 - Optionally 5th day am to complete the exam
- Covers Kofax TotalAgility 7



Course Materials, Software, and Hardware

- Student Guide, Lab Guide, Flash Drive
 - All course materials + Installation files
- Environment & Logins
 - Virtual Image (ReadyTech or locally)
 - Username: Trainee
 - Password: W0rkstation!
- Labs build in complexity
 - Additional self-learning modules



Course Goal

- To understand the Intelligent Automation (IA) Platform
- To provide an overview of the main features in the TotalAgility product
- To provide an introduction to using the designers and run time interfaces
- To enable students to attend additional TotalAgility training courses



Course Roadmap

- Day 1
 - Overview of Kofax and TotalAgility, Installation and Server Settings
 - Create a basic Capture Process
 - Create Resources
 - Create a Separation Profile, Folder, Extraction Group, and Classification group
- Day 2
 - Configure process properties, Variables, Capture nodes
 - Create a Website, Forms and Navigation
 - Configure Classification
 - Configure Extraction
 - Create a basic BPM Case based process



Course Roadmap

- Day 3
 - Variables and Data Access
 - Email Notification and Document Creation
 - Forms, Navigation and Security
 - Customize Forms
- Day 4
 - Configuring Capture and Personal Loan Process
 - Configuring Export to Systems of Record
 - Configuring Email and Watched Folders as Capture Input Sources
 - Optional – MFP as Capture Input Source
 - Optional – Mobile and Scanners and as Capture Input Sources
 - Optional – Export Solution as a Package
 - Optional – Debugging
 - Exam Preparation



Exam

- **Navigate** to <https://learn.kofax.com/>
- **Login** with your **email address** and **password**
- Open the Kofax TotalAgility 7.6 Essentials Certification Exam | EX-TA-ESS-076

The image shows a login form for Kofax. At the top right, there is a 'xLogin' link. The form has two input fields: one for the email address (containing 'trainee@kofax.com') and one for the password (containing '*****'). Below the password field are two buttons: 'Log in' and 'Register'. There is also a checkbox labeled 'Remember me'. At the bottom, there are two links: 'Forgot Username?' and 'Forgot Password?'.

Introduction Overview



- Introduction to Kofax Inc.
- Intelligent Automation (IA) Platform
- What is Kofax TotalAgility 7?
- What is Capture?
- What is BPM/Case Management?
- Analytics & Business Intelligence (BI) Services
- Data Integration Services
- TotalAgility History, Technology, and Architecture
- TotalAgility Components
- TotalAgility Best Practice
- TotalAgility Training, Support, & Documentation

Introduction to Kofax Inc.



Kofax – Global Presence

Privately owned:

Headquarters:

Employees:

Channel partners:

Irvine, CA

1,600+ in **35** countries

650+ in **60** countries

Successful

Customers:

20,000+

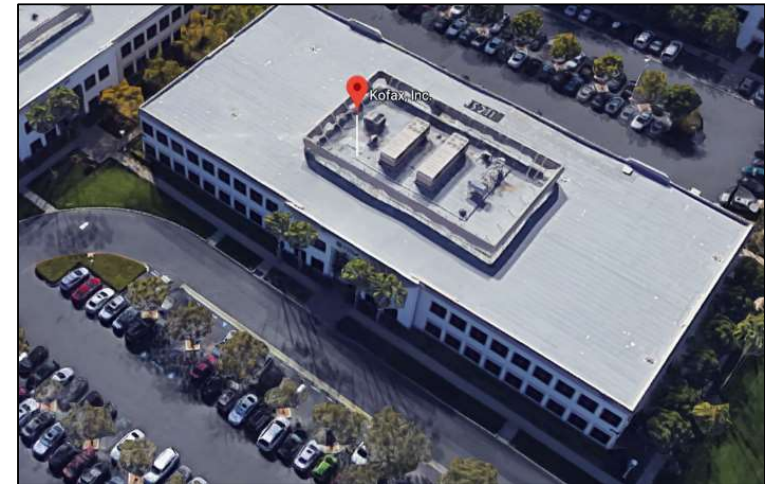
Software seats:

150,000+

ERP, CRM, LOB integrations: **Tens of thousands**

Awards and Recognition

www.kofax.com



Kofax Named a Leader in Aragon Research
Tech Spectrum™ for Workflow and Content
Automation



[READ THE REPORT](#)

Kofax Named a Strong Performer in
The Forrester Wave™: Robotic
Process Automation, Q2 2018

FORRESTER

[READ REPORT](#)

Kofax Intelligent Automation (IA) Platform



Kofax Intelligent Automation

- Five unified capabilities that help our customers work like tomorrow

COGNITIVE CAPTURE

Ingest & understand any document and its information via any ingestion channel and in any format with capture and cognitive document automation

MOBILITY & ENGAGEMENT

Communicate and transact in efficient, effective, and trusted ways with e-signature, facial recognition and on-demand communications

ADVANCED ANALYTICS

Provide actionable analytics for any business process with increased visibility and deeper insights



ROBOTIC PROCESS AUTOMATION

Automate repetitive tasks with a digital workforce of attended and unattended software robots

PROCESS ORCHESTRATION

Drive successful outcomes by orchestrating multiple actions, people, software robots, policies & systems

Kofax TotalAgility



What is Kofax TotalAgility? What does it do?

- Kofax TotalAgility™ 7 dramatically transforms and simplifies the business critical First Mile™ of real time, information intensive customer interactions
- Kofax TotalAgility combines capture, process management, analytics, and mobile capabilities into a single unified platform
- Smart process applications platform that provides an essential connection between an organization's systems of engagement and systems of record
- Available as On-Premise/SaaS multi-tenant offering

Multi-Channel Capture



Fax



Thin Client Scanning



File Import Profile: Default Page 1 of 3

Document Type: NWest

Navigator

- BasicFolding (2)
 - 1: Default (2)
 - 2: TSpect (16)
- Supplier (2)
 - 1: NWest (3)
 - 2: NWest (4)
- Child (2)
 - 1: NWest (2)
- Supplier (1)
 - 1: NWest (1)
- Child (1)

Ordered By:

Tri-Spectrum Solutions
21 Tylor St., Suite 100
New York, NY 02395

Bob Thompson
956 South Street
San Diego, CA
92750

Please check any items that apply:

☐ Do you wish to be on our mailing list?
☐ Do you wish to receive special offers?

Method of Payment:

☐ Check or Money Order Enclosed ☐ Purchase Order No. _____

Please Bill: ☐ Visa ☒ MasterCard ☐ American Express

Credit Card Number: 6 9 4 2 3 8 0 3 5 4 9 3 3 Expiration Date: 04 - 2002

Quantity	Item #	Description	Unit Price	Amount
2	5208	STEMWARE PROTECTOR	19.95	39.90

Thumbnails

Ready Folder: 2 / 7 Document: 3 / 11 Page: 1 / 3 Invalid Documents: 2

MFP Capture with Panel Integration



Mobile Capture



Image Perfection

No VRS

AIRWAY USA Airbill 807030972286 0210 From 10 No. **Billing Copy**

1 From _____ Sender's Account Number 4293888

Date _____

Sender's Name JANET ROSE Phone 562-726-0110

Company JANET'S FLOWERS

Address 285 LONG BEACH BLVD. Dept./Floor/Suite/Room _____

City LONG BEACH State CA ZIP 90802

2 Your Internal Billing Reference Information _____

3 To Recipient's Name Dr. Stevenson Phone _____

Company Expert Clinical Laboratory

Address 16245 Laguna Canyon Road Dept./Floor/Suite/Room _____

City Tustin State CA ZIP 92618

For HOLD at Location check here _____

1 ☐ Mail Wednesday 31 ☐ Mail Saturday 30 ☐ NEW Sunday Delivery 30 ☐ NEW Sunday Delivery 30

2 ☐ Express Package Service Packages under 100 lbs. ☐ Priority Overnight ☐ First Overnight ☐ Standard Overnight

3 ☐ Express Freight Service Packages over 100 lbs. ☐ Overnight Freight ☐ 2Day Freight ☐ 3Day Freight ☐ Express Saver Freight

4 Packaging ☐ Letter ☐ Pak ☐ Box ☐ Tube ☐ Other

5 Special Handling ☐ Fragile ☐ Perishable ☐ Hazardous ☐ Other

6 Payment ☐ Bill Me ☐ Recipient ☐ Third Party ☐ Credit Card ☐ Check

Account No. 1234 5643 9999 0001 Card No. 02101

Total Packages _____ Total Weight _____ Total Declared Value* _____ Total Charges _____

Release Signature _____

Barcode: 1 2 3 4 5 6 7

VRS

With VRS

AIRWAY USA Airbill 807030972286 0210 From 10 No. **Billing Copy**

1 From _____ Sender's Account Number 4293888

Date _____

Sender's Name JANET ROSE Phone 562-726-0110

Company JANET'S FLOWERS

Address 285 LONG BEACH BLVD. Dept./Floor/Suite/Room _____

City LONG BEACH State CA ZIP 90802

2 Your Internal Billing Reference Information _____

3 To Recipient's Name Dr. Stevenson Phone 949-727-1735

Company Expert Clinical Laboratory

Address 16245 Laguna Canyon Road Dept./Floor/Suite/Room _____

City Tustin State CA ZIP 92618

For HOLD at Location check here _____

1 ☐ Mail Wednesday 31 ☐ Mail Saturday 30 ☐ NEW Sunday Delivery 30 ☐ NEW Sunday Delivery 30

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Account No. 1234 5643 9999 0001 Card No. 02101

Total Packages _____ Total Weight _____ Total Declared Value* _____ Total Charges _____

Release Signature _____

Barcode: 1 2 3 4 5 6 7

VRS

What is Kofax TotalAgility? What does it do?



- Capture
 - Multiple capture mechanisms
 - Web Scan, Mobile, Email, Watched Folders, MFP, Fax
 - Image enhancement and Transformation capabilities
 - Classification, separation, and extraction capabilities
 - Bar code/patch code separation classification
 - Standard and trainable document separation
 - PDF generation and Document Conversion capabilities
 - Thin client document review, validation, verification

What is Kofax TotalAgility? What does it do?

- Workflow
 - Full BPM/Case Management capability to model end-end organizational processes
 - Process Design
- Form Designer
 - Form Design without code
 - Automatic deployment
- Integration with:
 - Robotic Process Automation (RPA) using Kofax RPA
 - Analytics and Business Intelligence Services
 - Microsoft products e.g. SharePoint, Dynamics, Word, Exchange, SQL Server
 - Common Web Services standard e.g. Soap, Soap WCF, Rest
 - .NET e.g. call a .NET dll directly from a process

What is Kofax TotalAgility? What does it do?



- Smart Process Applications
 - Applications built on top of the TotalAgility framework
- Examples
 - Accounts Payable
 - Mortgage
 - Invoice Processing
 - Customer Onboarding
 - Digital Mailroom

What is Capture?



What is Capture?

- Ability to capture and extract data from electronic documents or paper based forms
- Documents can come from Multiple channels
- All channels are supported:
 - Scan, Email, Mobile, Watched Folder, MFP, Fax
- Support for structured, semi-structured, and unstructured documents
- Documents temporarily stored in a database
- Documents can be classified (document type determined via it's layout or content)



What is Capture?

- Data can be extracted e.g. customer name, mortgage number
- Extracted data can be exported to back end systems
- Online classification and extraction learning – learn by example



What is BPM/Case Management?



Analytics & Business Intelligence Services

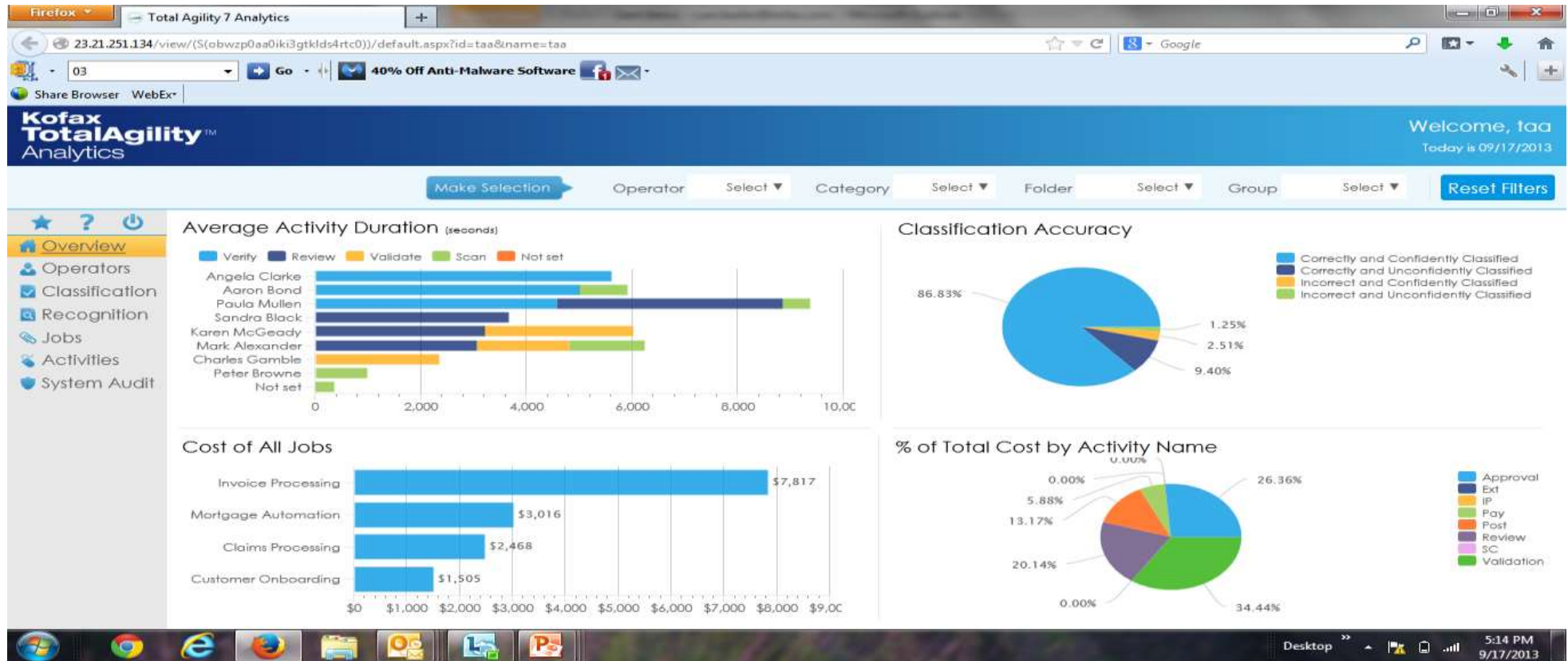


Analytics & Business Intelligence Services



- Insight
 - KAFTA (Kofax Analytics for TotalAgility)
 - Pre-defined reports for mainly capture processes
 - TotalAgility Analytics
 - Full BI Reporting for TotalAgility process data

Analytics & Business Intelligence Services



Integration Services



Integration with other Kofax Products



- Kofax RPA
 - Web data extraction, integration, and robotic process automation
- Kofax Communications Manager (KCM)
 - Enables you to create relevant, accurate, and highly personalized content, delivered in both paged (e.g. print or PDF) and non-paged formats (e.g. email, HTML, and XML)
- Kofax SignDoc
 - e-signatures
- Kofax Insight
 - KAFTA (Kofax Analytics for TotalAgility)
 - Pre-defined reports for mainly capture processes
 - TotalAgility Analytics
 - Full BI Reporting for TotalAgility process data

TotalAgility History, Technology, and Architecture



Product History

- Kofax TotalAgility was first released in March 2000, currently v7.6
 - v6.0 released in Nov 2012 (full .NET, On-Premise or Cloud (Azure))
 - Previous version was 5.5 (built as COM+ and (SOA) to exploit MSDTS and .NET)
- Kofax TotalAgility 7 is the integration of Kofax Web Capture, Kofax Transformation Toolkit, and TotalAgility components and functionality
- Microsoft-based, but built for interoperability with other systems



A migration path is supported to go from v5.5 and v6.0 to Kofax TotalAgility7

Underlying Technology



- **Architecture**

- Designer – HTML5 – Chrome recommended
- Transformation Designer – Windows Application
- Workspace – Out of box run time thin client
- Web Forms – HTML5 / JavaScript
- Exploits Microsoft .NET architecture
- Number of services e.g. TotalAgility Core Worker makes its easy to adopt, deploy, integrate with existing systems, and scale

- **Components**

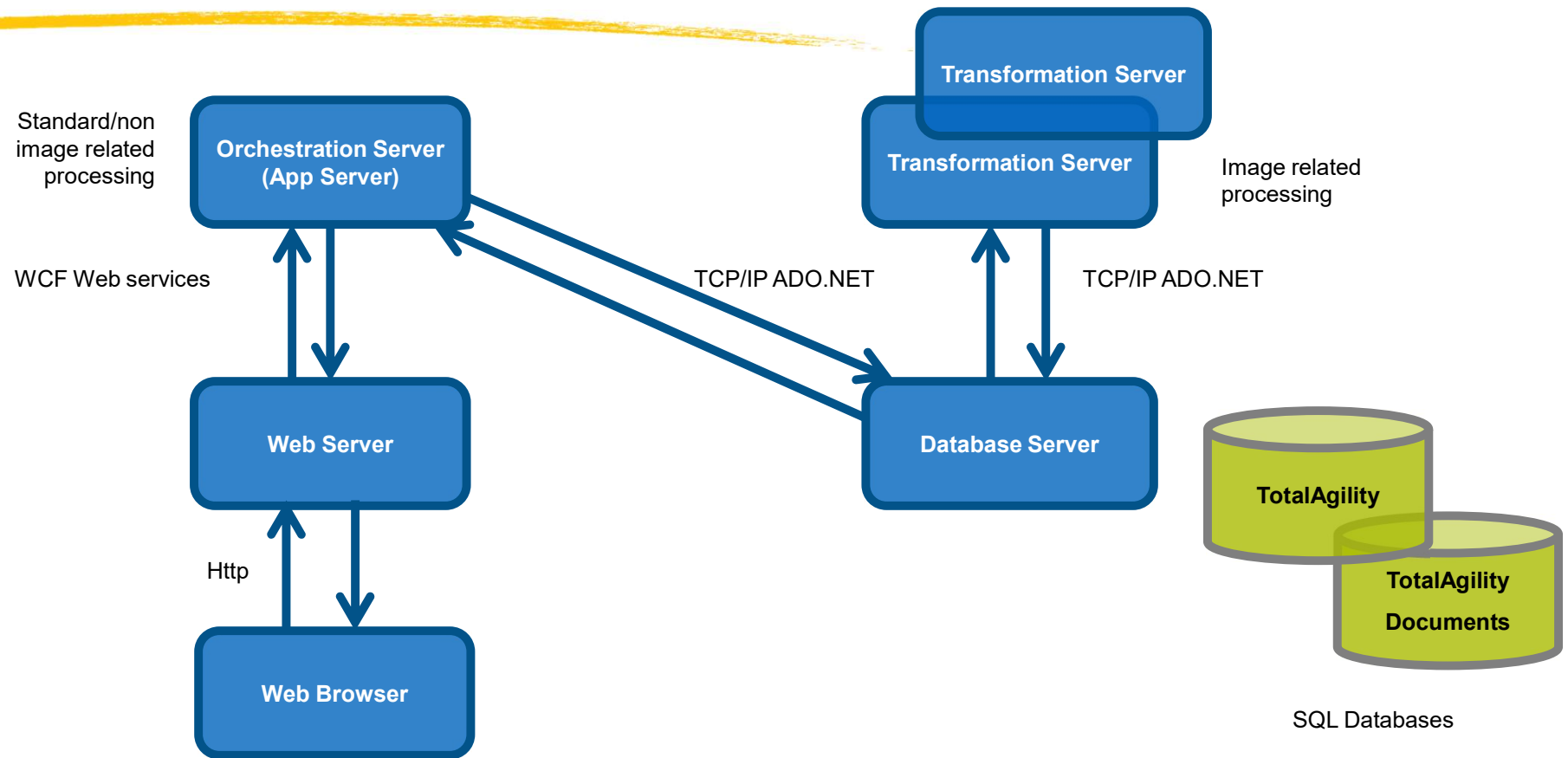
- Web Server
- Application Server (Orchestration and Transformation)
- Database Server

Underlying Technology (cont.)

■ Integration

- Database Connections (SQL server, Oracle)
- Web Services (REST, WCF, SOAP)
- .NET Assemblies
- On-Premise Export Connectors for Capture
- Additional On-Premise LOB Connectors:
 - MS Exchange, MS SharePoint, MS Dynamics CRM, MS Dynamics AX, Micro Focus Content Manager, CMIS
- Other BPM/DCM Features:
 - Simulation, Import from XPDL and Visio, Outlook client integration

Kofax TotalAgility Architecture Diagram



TotalAgility Components

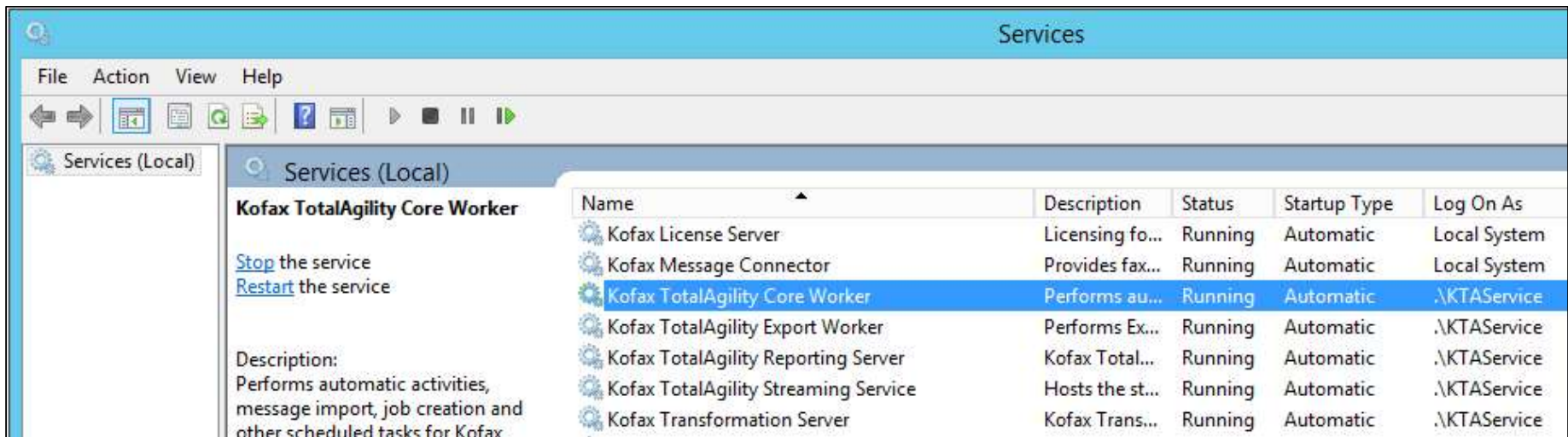


TotalAgility Components

- Windows Services
 - Executing Processes, Transformation, Importing, Exporting, and Licensing
- Backend SQL Database
 - Stores documents,
 - Design time and run time items
- KIC (Kofax Import Connector)
 - e.g. monitor mailboxes, watched folders
- Export Connectors
 - Export extracted fields/data and images to other systems
- Designers (Design time interfaces)
 - Designer is a Web based Designer for designing e.g. processes, forms
 - Transformation Designer is a Windows Application for configuring e.g. classification, extraction, and transformation
- Workspace (Run time interface)
 - Web Interface for end users to capture and process items

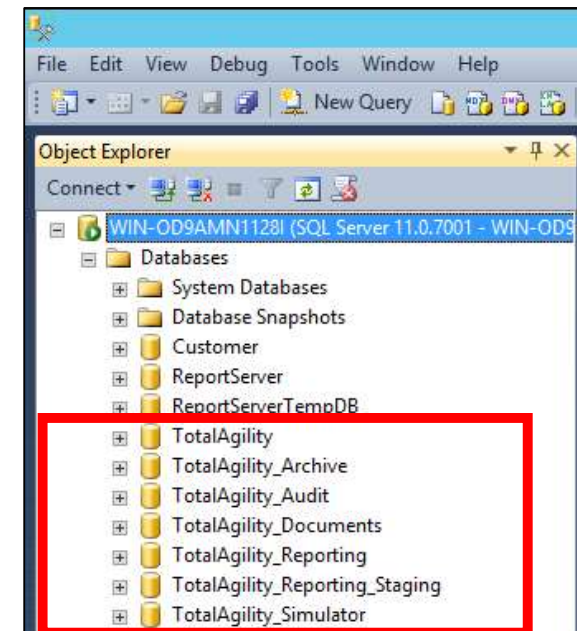
Windows Services

- Services to manage workflow, import, export, licensing, and image transformation



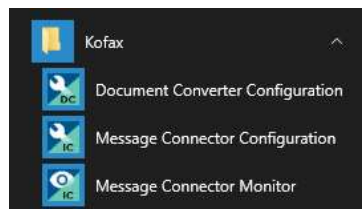
Backend Databases

- The database repository stores:
 - Documents
 - Design time and run time items
 - Audit information
 - Archived items
 - Reporting data



KIC

- Web site that monitors and processes import connections



The screenshot shows the Kofax Message Connector Web Portal. The browser address bar displays 'localhost:25086/en/file/index.html'. The page title is 'KOFAX Message Connector'. A language dropdown menu is set to 'English'. The main content area is titled 'Monitor for Message Connector (Version: 9.0.1.5547, Instance 01)'. It features a 'Refresh' button and a table with columns: State, Info, Description, and Commands. The table lists various components and their status, including Master, Common input handling, File Component, SMTP Inbound component, POP3/IMAP and email outbound, Document Converter, SIP Component, Web Service Interface, External http interface, External https interface, Storage, and KC Interface Workflow. Each row includes a 'ShowConfig' link in the Commands column. Below the table, a 'Standby components' section lists: XML validation, MS Exchange Web Services, MS Graph API, Email Workflow, T.30 Component, FaxMain Component, RightFax Connector, Biscom Connector, Tiff Converter, Fax Workflow, Microsoft Tnef (winmail.dat) support, and TCSI Connector to TCOS. A footer note states: 'This window is used to display the result of the last command (e.g., Send a Test Fax).'

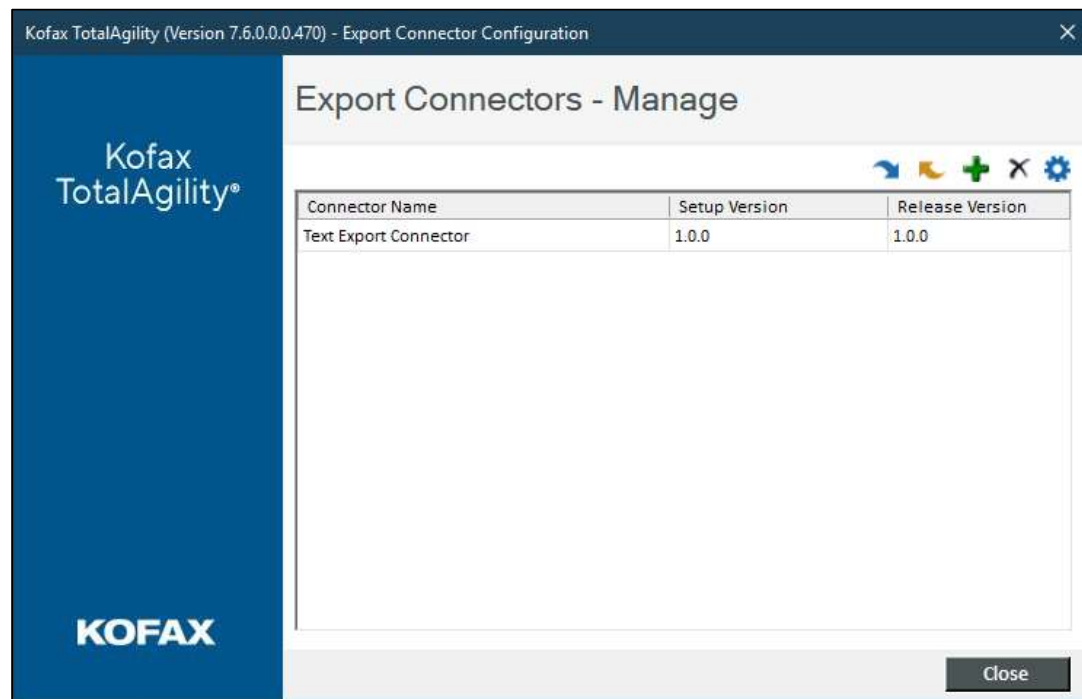
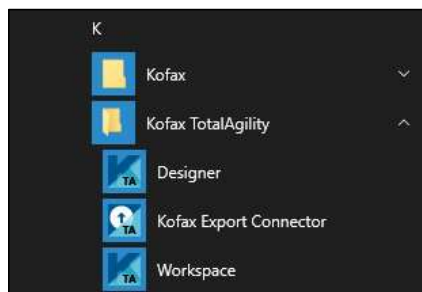
State	Info	Description	Commands
Running	Master		
Running	Common input handling	Inputs polled: 2	[ShowConfig]
Running	File Component		[ShowConfig]
Running	SMTP Inbound component		[ShowConfig]
Running	● smtp://all-adapters:25: [green]	Id 35026: Reception enabled.	
Running	POP3/IMAP and email outbound		[ShowConfig]
Running	Document Converter		[ShowConfig]
Running	SIP Component		[ShowConfig]
Running	Web Service Interface	Connector received 65 requests	
Running	● http://all-adapters:25086: [green]	Id 35026: Reception enabled.	
Running	External http interface		[ShowConfig]
Running	● http://all-adapters:25087: [green]	Id 35026: Reception enabled.	
Running	External https interface		[ShowConfig]
Running	● https://all-adapters:25088: [green]	Id 35026: Reception enabled.	
Running	Storage	Messages: 0 active, 2 processed. Disk usage: 1%, below target. Active: 0% of target.	[ShowConfig]
Running	KC Interface Workflow		[ShowConfig]
	Scheduler: send	Last Response: queue-empty Current activity: Calling Component Statistics: queue-empty: 1	
	Scheduler: archive	Last Response: queue-empty Current activity: Calling Component Statistics: queue-empty: 1	
	Scheduler: cleanup	Last Response: all-clean Current activity: Calling Component Statistics: all-clean: 1	

Standby components: XML validation, MS Exchange Web Services, MS Graph API, Email Workflow, T.30 Component, FaxMain Component, RightFax Connector, Biscom Connector, Tiff Converter, Fax Workflow, Microsoft Tnef (winmail.dat) support, TCSI Connector to TCOS

This window is used to display the result of the last command (e.g., Send a Test Fax).

Export Connectors

- Connectors to export extracted fields/data/images to other systems

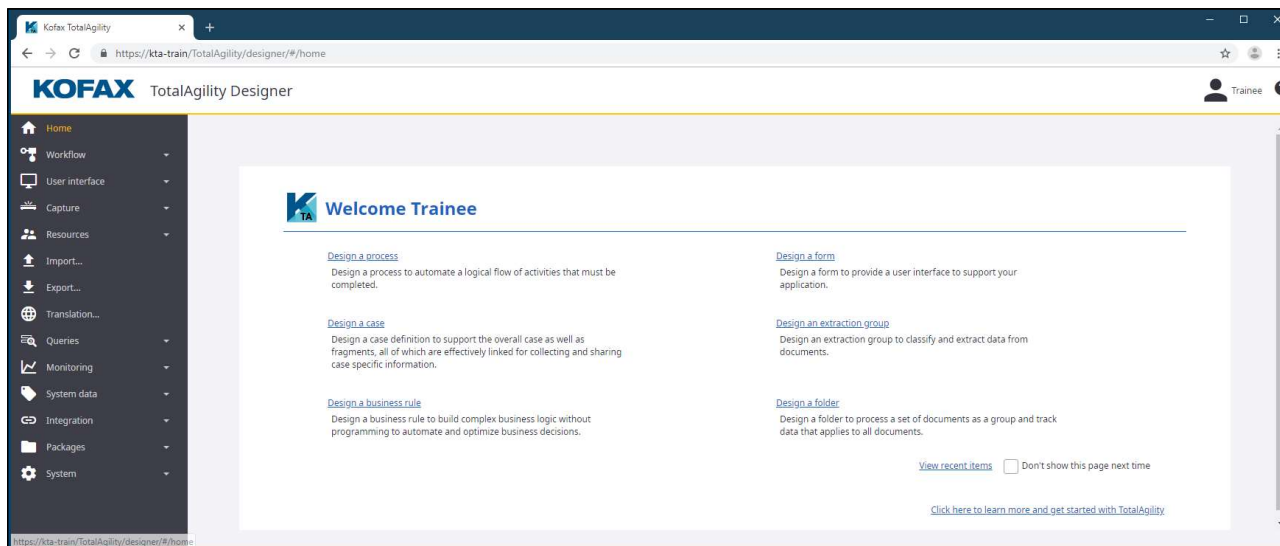


Kofax TotalAgility Designer and Transformation Designer

- The **TotalAgility Designer** is a design time HTML5 web based Application that allows you to:
 - Design capture processes, case and business processes, sites, and forms
- The **Transformation Designer** is a windows application that allow you to:
 - Configure/train classification, separation, extraction etc.
- The **Workspace** is a runtime HTML5/JavaScript thin client that allows you to:
 - Create an instance of a process
 - Scan documents
 - Administer run time jobs

Kofax TotalAgility Designer (cont.)

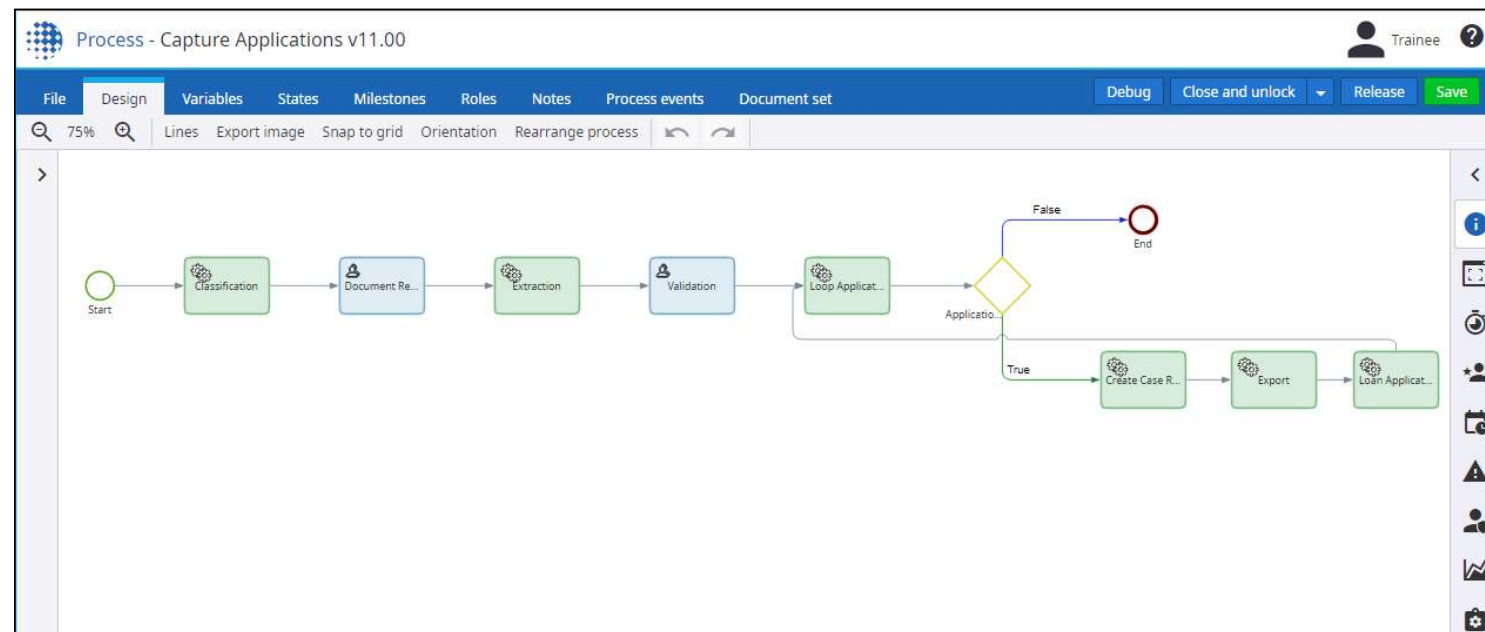
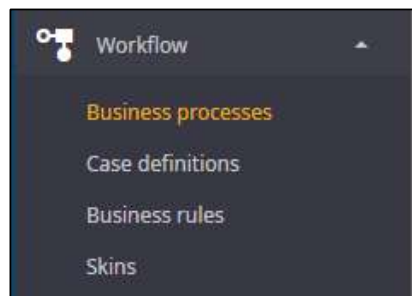
- The Designer is an easy-to-use, graphical environment for modelling, design, analysis, simulation, and testing of processes and forms
- It is an HTML5 design environment with the following components:



You can access the Designer on a client browser by entering the URL to the Designer.

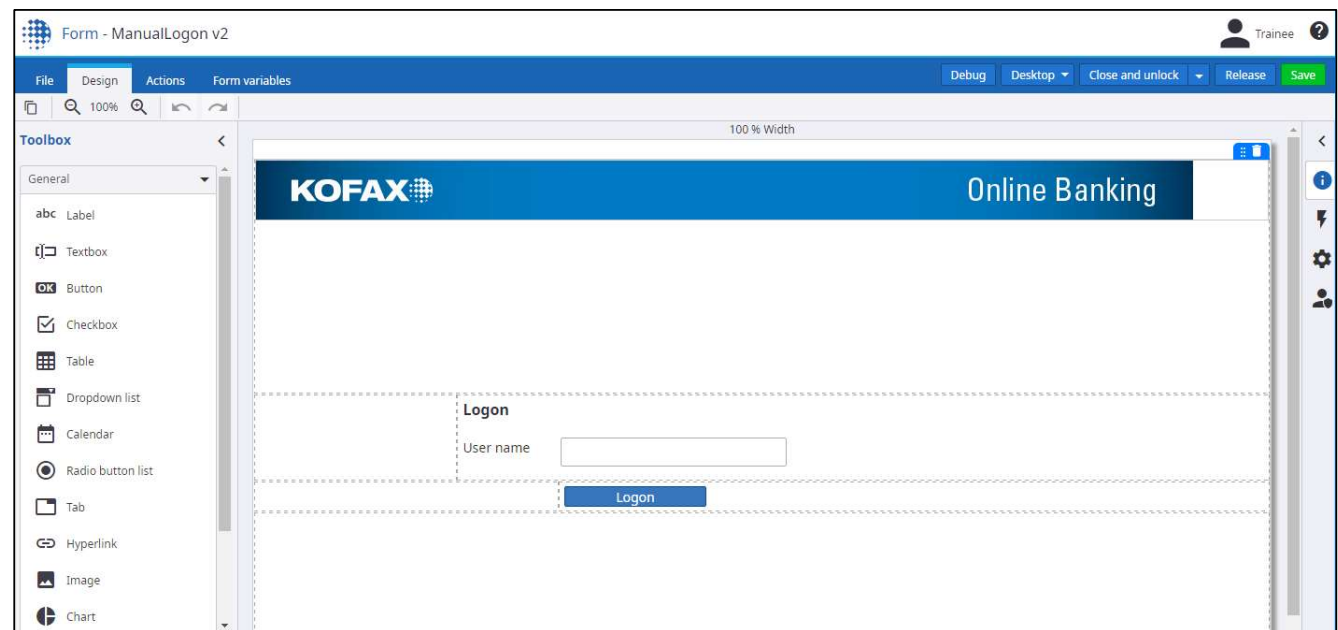
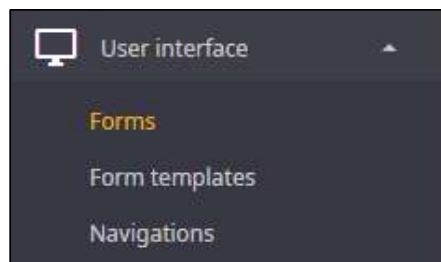
Kofax TotalAgility Designer – Process Designer

- The **Process Designer** helps you model business processes through a user-friendly graphical modelling environment
- Processes are saved in the database in XML format



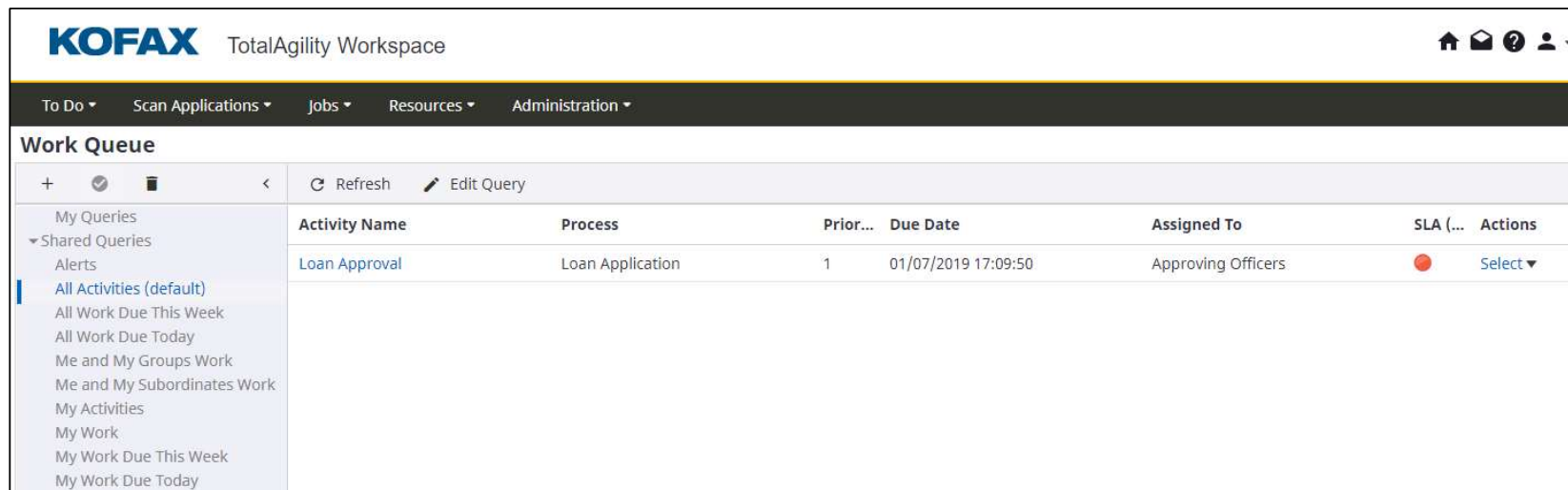
Kofax TotalAgility Designer – Forms Designer

- The **Forms Designer** helps you create workflow forms (screens) based on Kofax TotalAgility processes, without the need for extensive programming
- Forms are specified in the XML-based message definition, and held in the database and rendered by a Forms Server



Kofax TotalAgility Workspace (cont.)

- The **Workspace** is the interface for run-time users of Kofax TotalAgility 7
- Knowledge workers and capture operators receive and process work
- Managers can dynamically manage and optimize work within their teams
- Administrators can monitor the system
- All done in a thin client, HTML5 environment

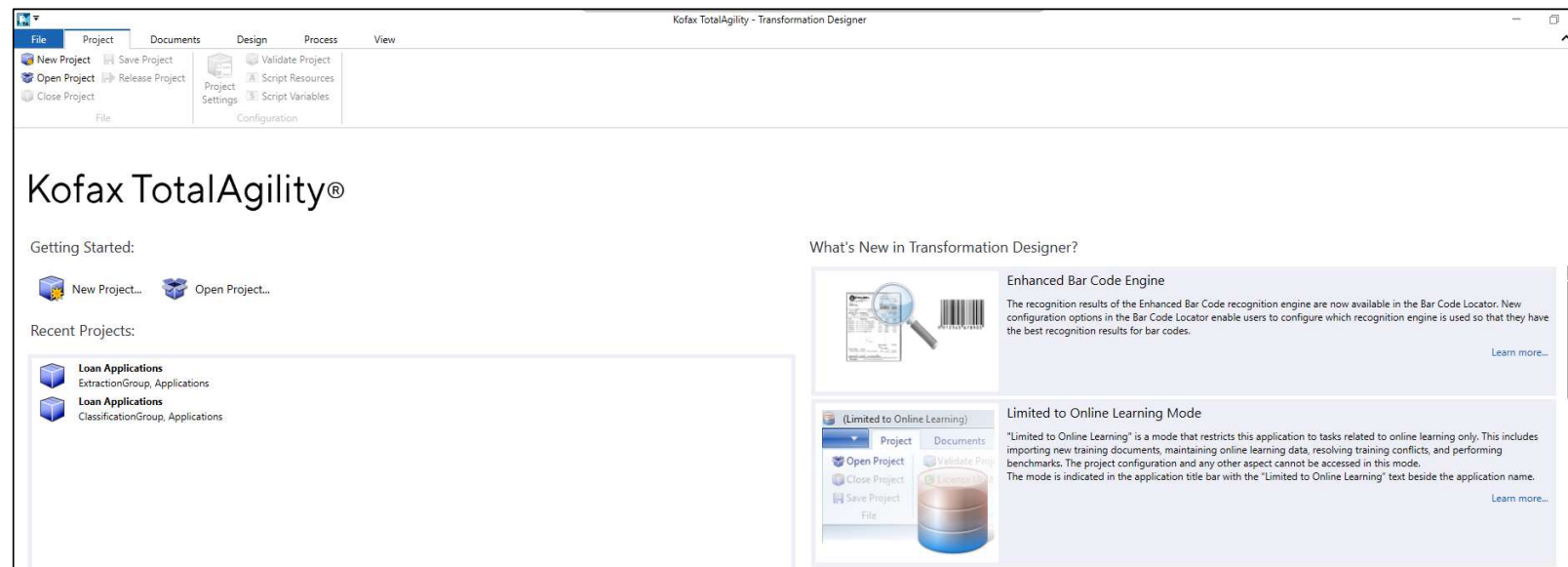


The screenshot displays the Kofax TotalAgility Workspace interface. At the top, the Kofax logo and 'TotalAgility Workspace' text are visible, along with navigation icons. Below this is a dark navigation bar with tabs: 'To Do', 'Scan Applications', 'Jobs', 'Resources', and 'Administration'. The main content area is titled 'Work Queue'. On the left, there is a sidebar with a tree view containing 'My Queries', 'Shared Queries', 'Alerts', and a list of activity filters including 'All Activities (default)', 'All Work Due This Week', 'All Work Due Today', 'Me and My Groups Work', 'Me and My Subordinates Work', 'My Activities', 'My Work', 'My Work Due This Week', and 'My Work Due Today'. The main table has columns: 'Activity Name', 'Process', 'Prior...', 'Due Date', 'Assigned To', 'SLA (...)', and 'Actions'. A single row is visible with the data: 'Loan Approval', 'Loan Application', '1', '01/07/2019 17:09:50', 'Approving Officers', a red dot, and a 'Select' dropdown arrow. Above the table, there are controls for '+', a refresh icon, a trash icon, and buttons for 'Refresh' and 'Edit Query'.

Activity Name	Process	Prior...	Due Date	Assigned To	SLA (...)	Actions
Loan Approval	Loan Application	1	01/07/2019 17:09:50	Approving Officers		Select ▼

Kofax TotalAgility Transformation Designer (cont.)

- The **Transformation Designer** is a Windows Application that provides a design time interface for configuring classification, extraction, validation, separation etc.
- You can install the Transformation Designer on a client laptop/PC
- Can train TotalAgility system to recognise documents/extract data



TotalAgility Implementation Best Practice Guide



Implementation Best Practice Guide



- What is the Best Practice Guide?
 - It provides best practice guidelines and recommendations for architecting, provisioning and maintaining a Kofax TotalAgility platform, and designing, implementing, deploying, monitoring and supporting solutions based on the TotalAgility platform and related technologies
 - In addition to guidelines on the TotalAgility product, advice is also included in respect of the use of Kofax Insight as a component of a TotalAgility platform implementation

Where can I get a the latest copy?

- Where can I get a copy?
 - Completing the TotalAgility Essentials course
 - A copy is provided in the Resources.zip file within the BestPractice folder
 - Please always obtain the latest version directly within the Partner or Customer Portal, or the Kofax intranet before embarking on your TotalAgility implementations



This is the only TotalAgility course where a copy is provided. You may be evaluating TotalAgility during the Essentials training, or you may not have access to the Customer or Partner Portal yet

TotalAgility Training, Support, & Documentation

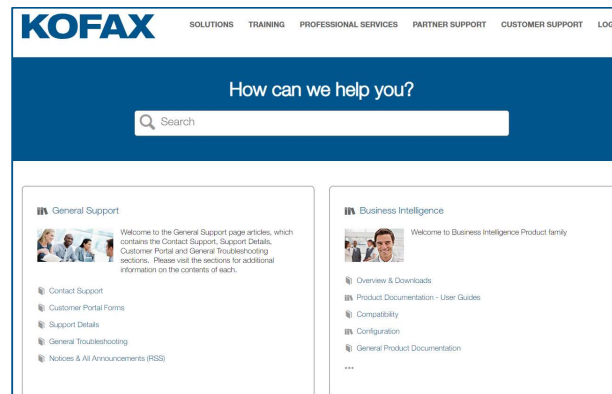


Where can I get TotalAgility Training Support?

- You can send emails to training@kofax.com if you require assistance with the training material
- You can find out more information about other Kofax TotalAgility courses by going to <https://learn.kofax.com>

Where can I get TotalAgility Technical Support?

- You may need to:
 - Obtain new releases, service packs or hotfixes
 - Download product documentation guides
 - Raise a support case
- You can register for a support portal account using the following URL
 - https://knowledge.kofax.com/General_Support/Contact_Support/00_Support_Portal_Information
- Once you have registered you will be able to raise support cases, download product documentation etc.



TotalAgility Product Documentation

- Please note that product documentation is not shipped with the Kofax TotalAgility product
- You can download all the documentation for TotalAgility using the support portal

