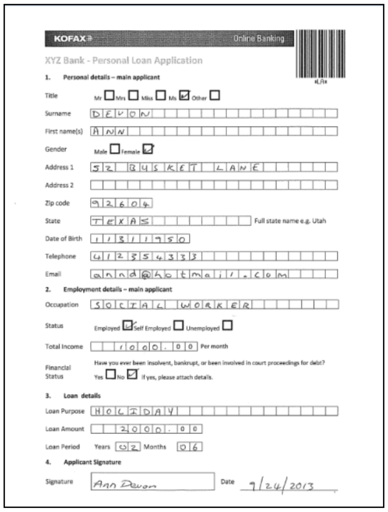
In this lab you will learn how to design and create a separation profile, an extraction group, a classification group, and a folder. You will also modify the default scan/vrs profile.

Lab 05-1

Create a Separation Profile

Create a Separation profile

In this part, you will create a separation profile. The profile will separate scanned documents into a folder. Each document (Application form) will only have one page, so we will set **Document Separation** to **Fixed Sheet**, with 1 sheet per document.


KOFAX Online Banking

XYZ Bank - Personal Loan Application

1. Personal details – main applicant

Title: Mr ☐ Mrs ☐ Miss ☐ Ms ☑ Other ☐

Surname: DEVON

First name(s): ANN

Gender: Male ☐ Female ☑

Address 1: 52 BUSKET LANE

Address 2:

Zip code: 92604

State: TEXAS Full state name e.g. Utah

Date of Birth: 1/31/1950

Telephone: 4123543333

Email: annd@hotmail.com

2. Employment details – main applicant

Occupation: SOCIAL WORKER

Status: Employed ☑ Self Employed ☐ Unemployed ☐

Total Income: 1000.00 Per month

Financial Status: Have you ever been insolvent, bankrupt, or been involved in court proceedings for debt? Yes ☐ No ☑ If yes, please attach details.

3. Loan details

Loan Purpose: HOLIDAY

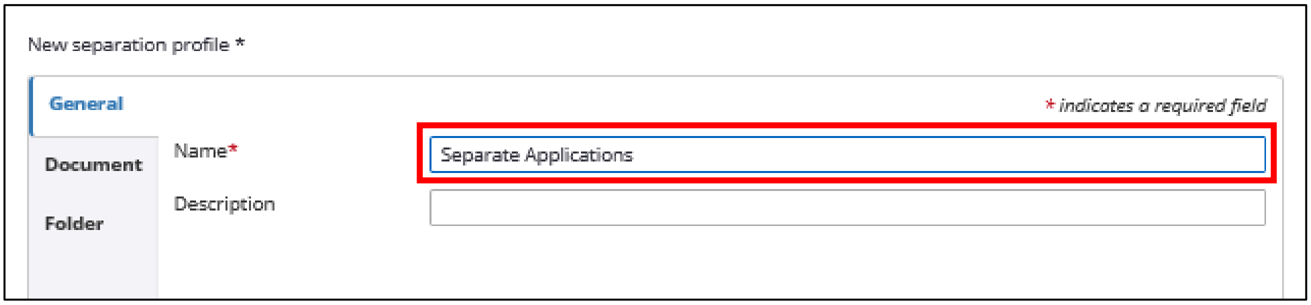
Loan Amount: 2000.00

Loan Period: Years 02 Months 06

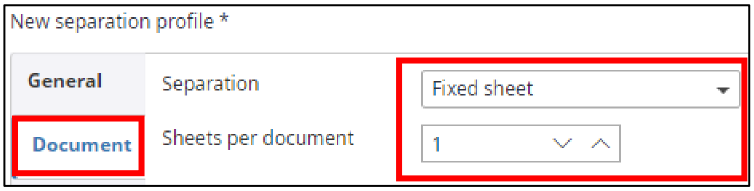
4. Applicant Signature

Signature: Ann Devon Date: 9/24/2013

1. From the **Main** menu navigate to **Capture > Separation profiles**, and click **New**.
2. Set the **Name** property to **Separate Applications**.



3. Select the **Document** tab.
4. From the **Separation** dropdown, select **Fixed Sheet,** and set **Sheets per document** to **1**.

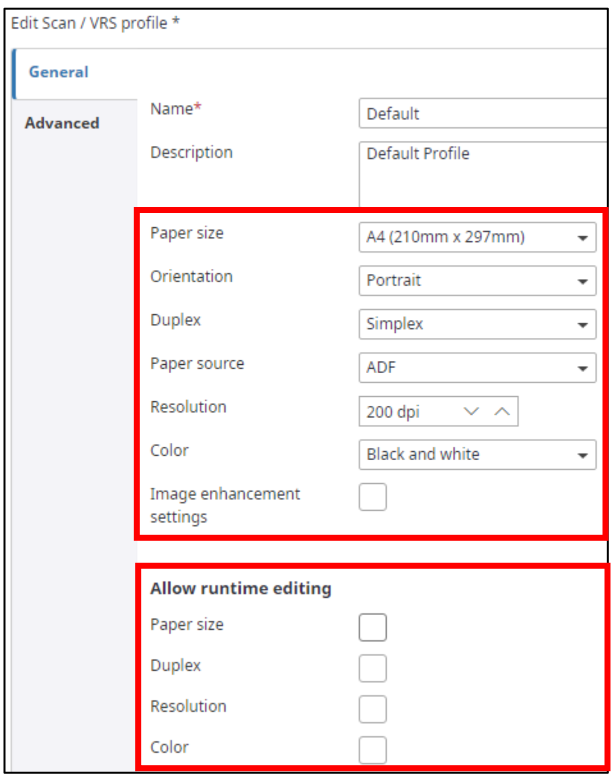


5. Click **Save**.

Modify the Default Scan / VRS Profile

In this part, you will modify the Default Scan / VRS settings. Scan settings are run when scanning an image or importing an image into TotalAgility e.g. via a scan create new job form. Note that in this course, you will use pre-scanned images that are A4 and 200 DPI. Kofax VirtualReScan® (VRS) is a patented Kofax technology that e.g. de-skews the image, separates the image from the background, and cleans up the image by removing artifacts such as shadows. This process greatly improves data extraction accuracy along with image quality.

6. From the **Main** menu navigate to **Capture > Scan/VRS profiles**, and click **Default**.
7. Configure the settings as shown below:



Note: If you are **Importing Images From File** (not a scanner) only Color, Image Enhancment Settings, and eVRS apply (Advanced tab).

8. Click **Save**.

Lab 05-2

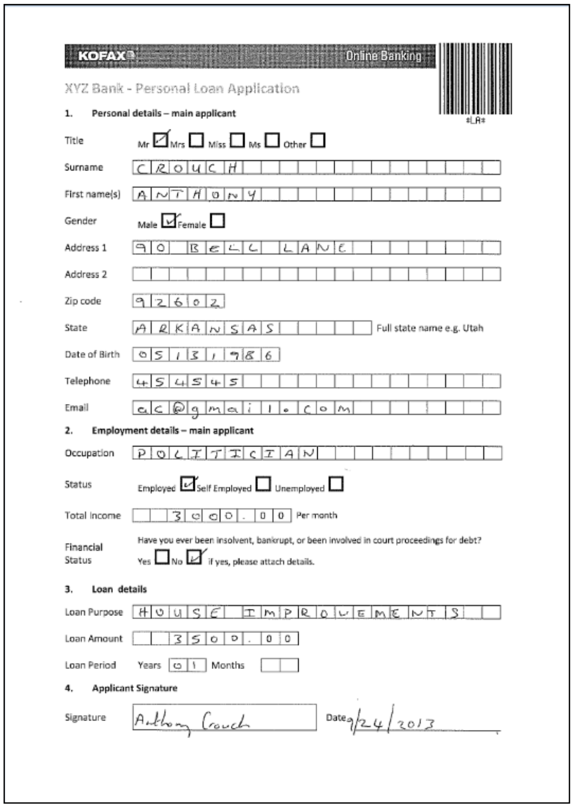
Create an Extraction Group

Create an Extraction Group

The Bank has a standard application form and a variant form that is still used in some States.

In this part, you will add an Extraction Group with 2 Loan Application Document Types, **Standard** and **Variant**. You will also add relevant Data Fields for each Document Type.

STANDARD



KOFAX Online Banking

XYZ Bank - Personal Loan Application

#LA#

1. Personal details – main applicant

Title: Mr [x] Mrs [ ] Miss [ ] Ms [ ] Other [ ]

Surname: CROUCH

First name(s): ANTHONY

Gender: Male [x] Female [ ]

Address 1: 90 BELL LANE

Address 2:

Zip code: 92602

State: ARKANSAS — Full state name e.g. Utah

Date of Birth: 05/13/1986

Telephone: 454545

Email: ac@gmail.com

2. Employment details – main applicant

Occupation: POLITICIAN

Status: Employed [x] Self Employed [ ] Unemployed [ ]

Total Income: 3000.00 Per month

Financial Status: Have you ever been insolvent, bankrupt, or been involved in court proceedings for debt? Yes [ ] No [x] if yes, please attach details.

3. Loan details

Loan Purpose: HOUSE IMPROVEMENTS

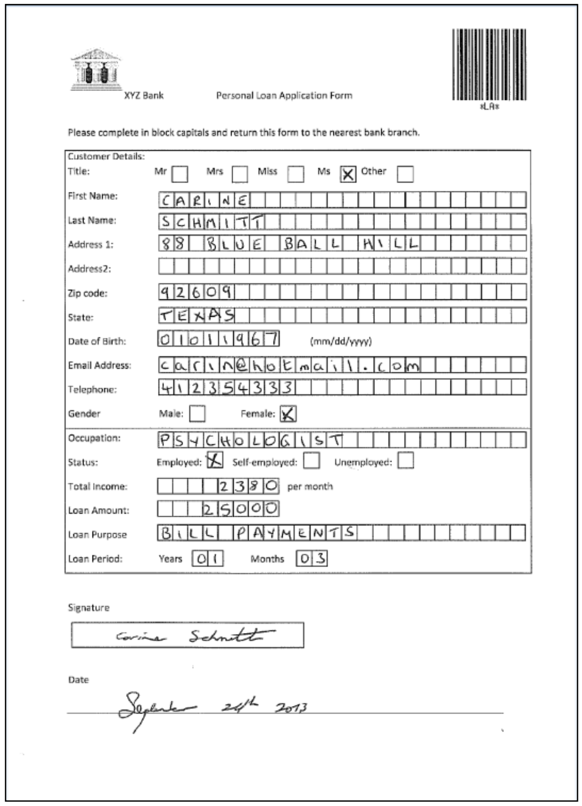
Loan Amount: 3500.00

Loan Period: Years 01 Months

4. Applicant Signature

Signature: Anthony Crouch Date 9/24/2013

VARIANT



XYZ Bank Personal Loan Application Form

#LA#

Please complete in block capitals and return this form to the nearest bank branch.

Customer Details:

Title: Mr [ ] Mrs [ ] Miss [ ] Ms [x] Other [ ]

First Name: CARINE

Last Name: SCHMITT

Address 1: 88 BLUE BALL HILL

Address2:

Zip code: 92609

State: TEXAS

Date of Birth: 01011967 (mm/dd/yyyy)

Email Address: carin@hotmail.com

Telephone: 41235 4333

Gender: Male: [ ] Female: [x]

Occupation: PSYCHOLOGIST

Status: Employed: [x] Self-employed: [ ] Unemployed: [ ]

Total Income: 2380 per month

Loan Amount: 25000

Loan Purpose: BILL PAYMENTS

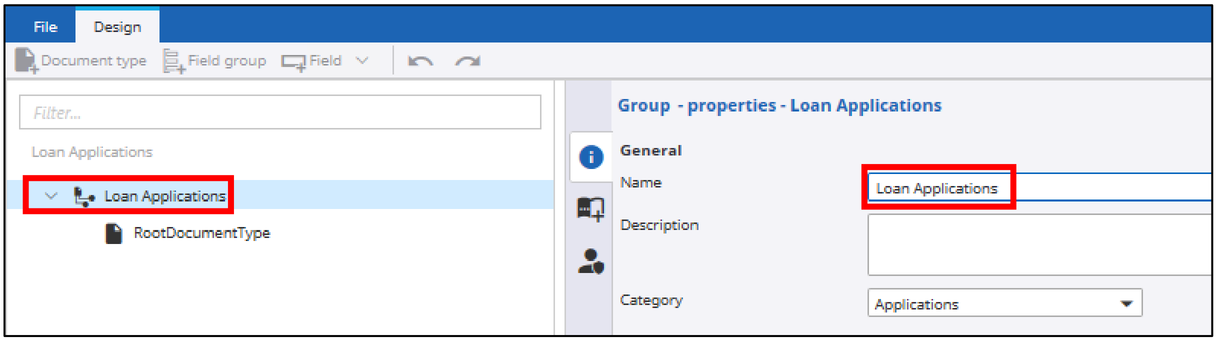
Loan Period: Years 01 Months 03

Signature: Corine Schmitt

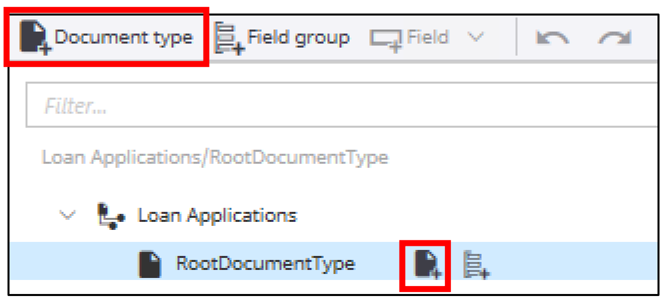
Date: September 24th 2013

Note: The position of the data on each form is different and the forms have hand written text.

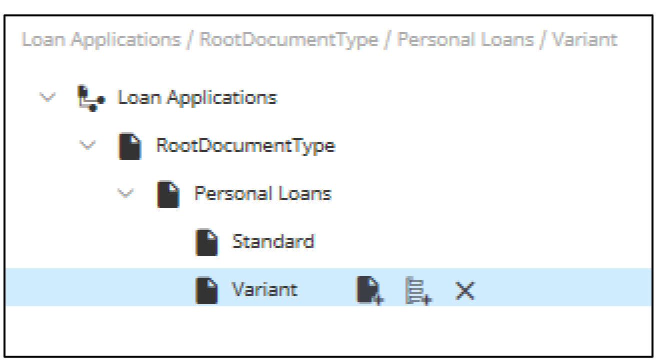
1. From the **Main** menu navigate to **Capture > Extraction groups**, and click **New**.
2. For **Group 1**, set the **Name** property to **Loan Applications**.
   Note: The **Category** is set to **Applications** (the Trainee's Working Category).



3. Select the **RootDocumentType**, and click the **Add document type** icon. You can do this by clicking the icon to the right, or the button on the toolbar.



4. **Document Type 1** is added and its properties are shown.
5. Set the **Name** property to **Personal Loans**.
6. Click the **Add document type** icon.
7. Set the **Name** property to **Standard**.
   Note: You can do this inline by double clicking, and pressing the **Tab** key when finished, or via the **Properties** and the **Name** field.
8. Select the **Personal Loans** document type and click the **Add document type** icon.
9. Set the **Name** property to **Variant**.

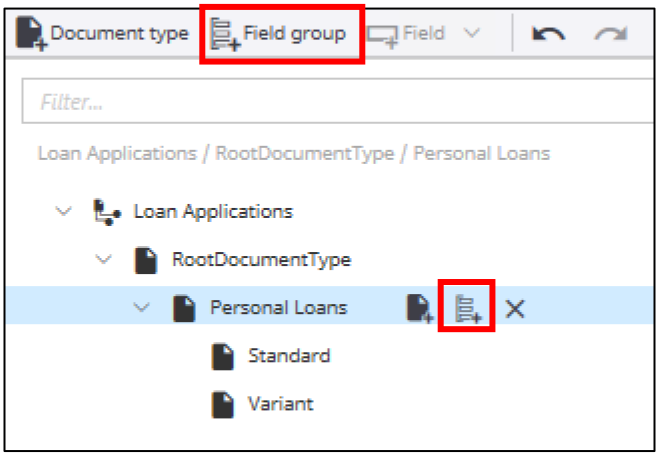


Note: In the example, Standard and Variant document types *inherit* from the Personal Loans document type. The inheritance includes e.g. field groups, fields, document validation, and field validation. Note that the RootDocumentType does not have the same configuration options as the Personal Loans document type. You cannot inherity document validation or Field Validation from the RootDocumentType.

Specify Extraction Fields

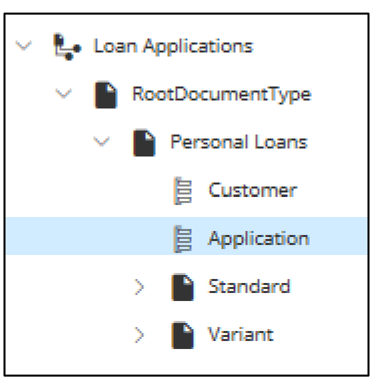
In this part, you will add fields that you would like to extract from each document type. Adding fields to the Personal Loans (Parent Document Type) will result in these fields being inherited across all child document types.

10. Select **Personal Loans**, and click **Add field group**. You can do this by clicking the icon to the right, or the button on the toolbar.

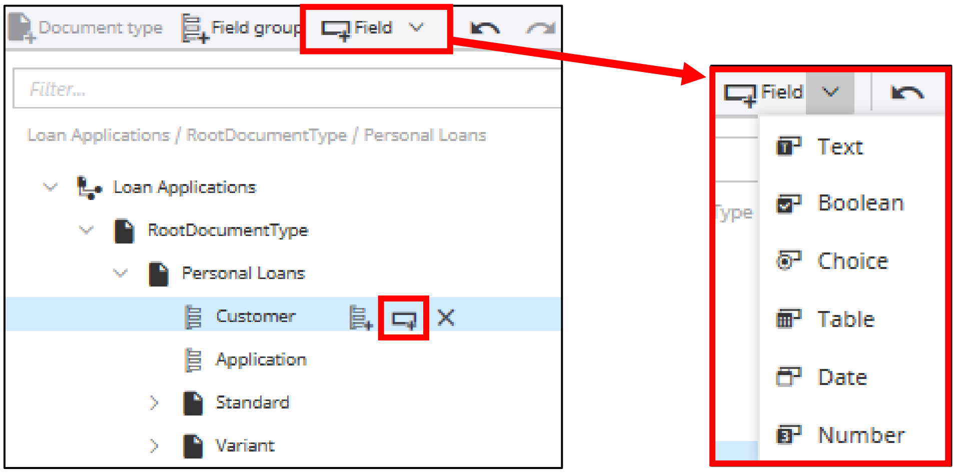


11. Set the **Name** property to **Customer**.
    Note: This new field group has been added to all child document types.

12. Repeat steps 10 to 11 and name the new field grouping **Application**.

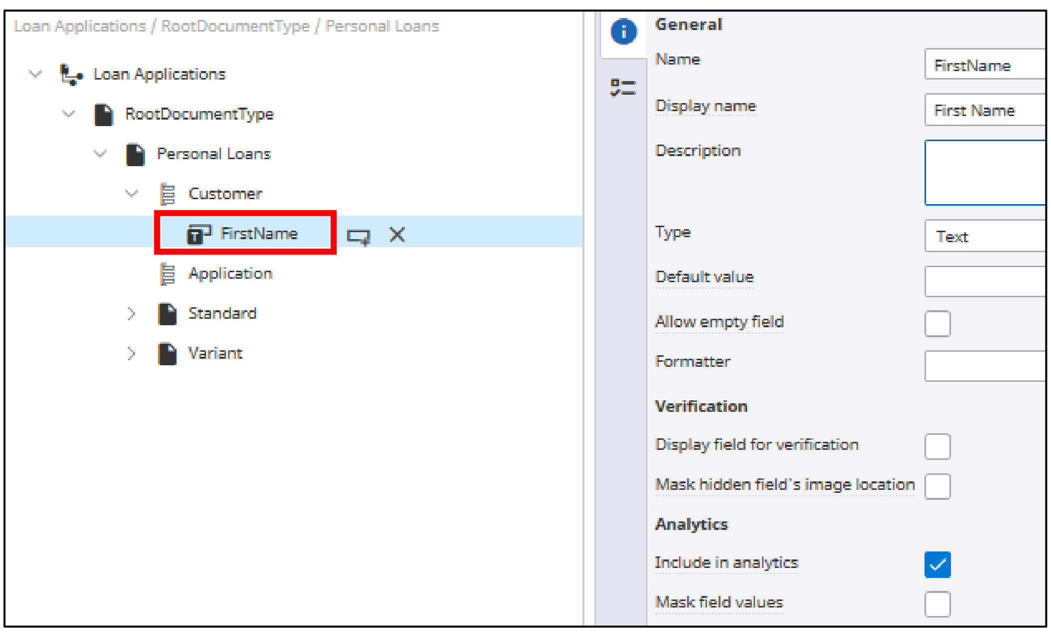


13. Select the **Customer** field group, and click **Add field**. You can do this by clicking the icon to the right, or the button on the toolbar.
    Note: By using the button on the toolbar, you can also specify the field type as you are adding it.



14. Set the field **Name** to **FirstName**. You can do this inline and press Tab when finished, or via the field properties.

15. In the Field Properties set the **Display Name** to **First Name** and **Type** as **Text**.
    Notes: (i) Display Name is automatically populated using the field name.
    (ii) Field names cannot contain spaces.



16. Configure the remaining fields as shown below:

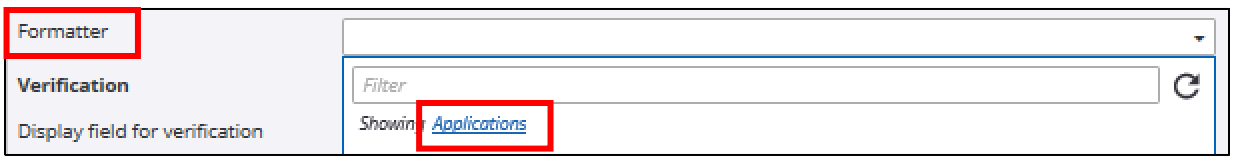
	Name	Display Name	Type
1	FirstName (already entered)	First Name	Text
2	LastName	Last Name	Text
3	Address	Address	Text
4	State	State	Text
5	ZipCode	Zip Code	Text
6	EmploymentStatus	Employment Status	Choice

Note: You can click the **Add field** icon to the right of an existing field to add additional fields, if you prefer to add all the fields in one go, and then change their types.

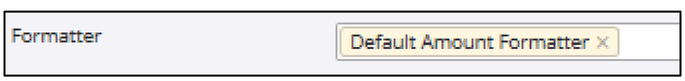
17. Select the **Application** field group and click **Add field**.

18. Set the **Name** to **Amount**, and from the **Type** dropdown, select **Number**.

19. From the **Formatter** dropdown set the **Default Amount Formatter** (select the Default Category).



Note: You can learn more about Formatters and Validation in the MCC course.

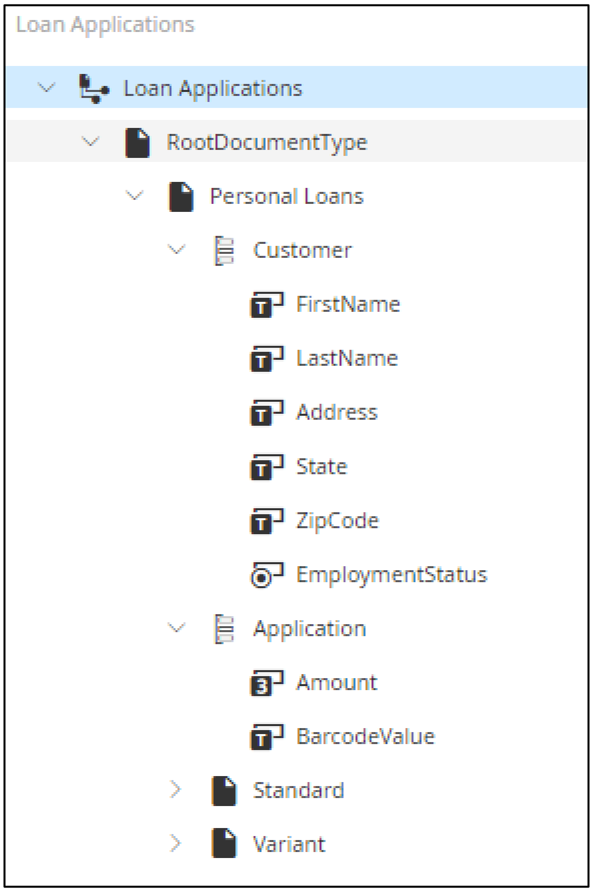


20. Select the **Application** Field group and add a Text field.

21. Set the **Name** to **BarcodeValue, Display Name** to **Barcode Value,** and **Type** as **Text**.

	Name	Display Name	Type	Formatter
1	Amount	Amount	Number	Default Amount Formatter
2	BarcodeValue	Barcode Value	Text	

22. Your **Extraction Group** should look like this:



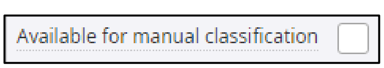
Note: Leave the Extraction group open for the next part.

Available for Manual Classification

In this part, you will prevent end users from manually classifying a document as a Personal Loan document type i.e. they will have to select Standard or Variant.

23. Select the **Personal Loans** document type.

24. Uncheck the **Available for manual classification** checkbox.



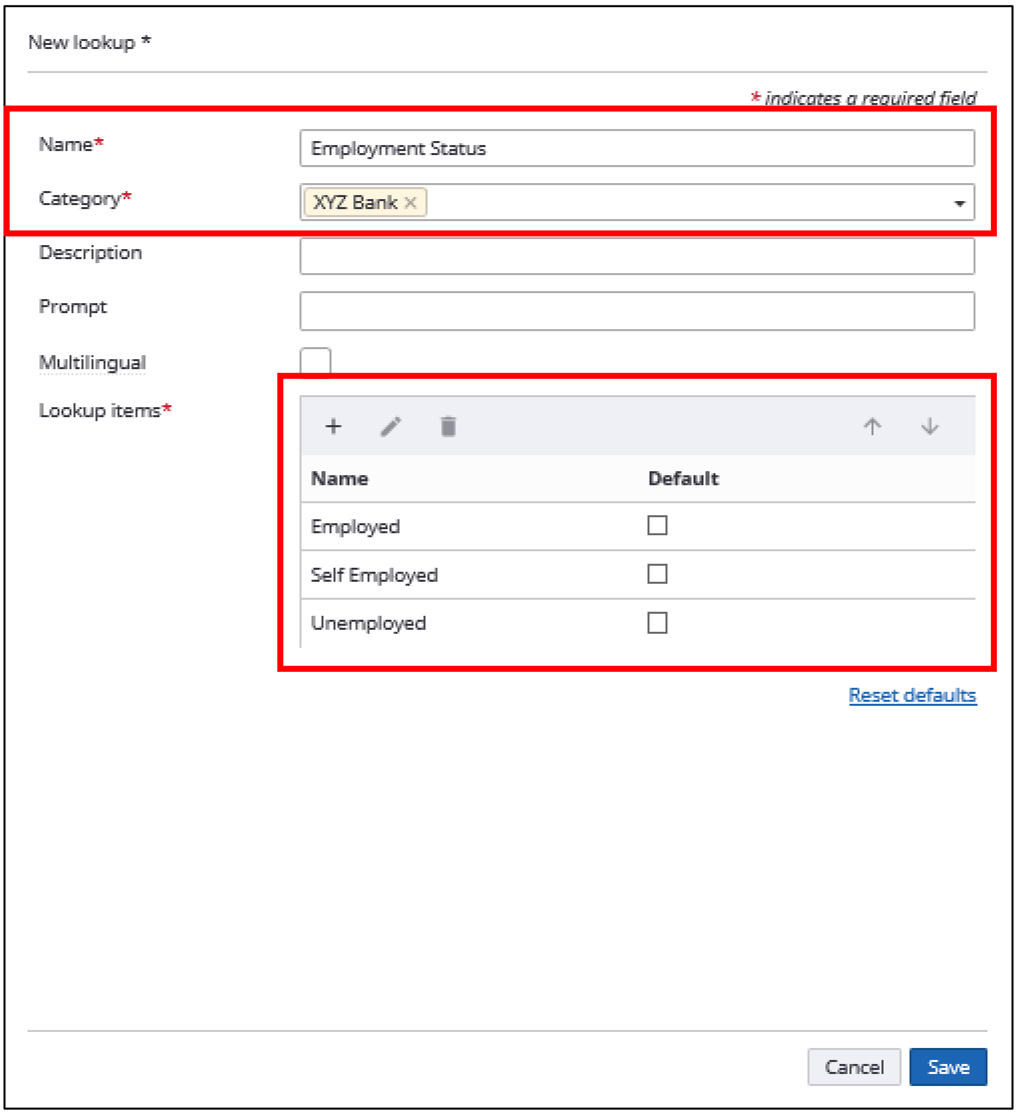
25. From the **Ribbon**, click **Save** (leave the extraction group open).

Add a Lookup

In this part, you will use a Lookup for the Employment Status. The status will either be Employed, Self Employed, or Unemployed. Lookups are re-usable lists that can be used for extraction fields or on forms.

26. From the **Main** menu navigate to **System data > Lookups**, and click **New**.

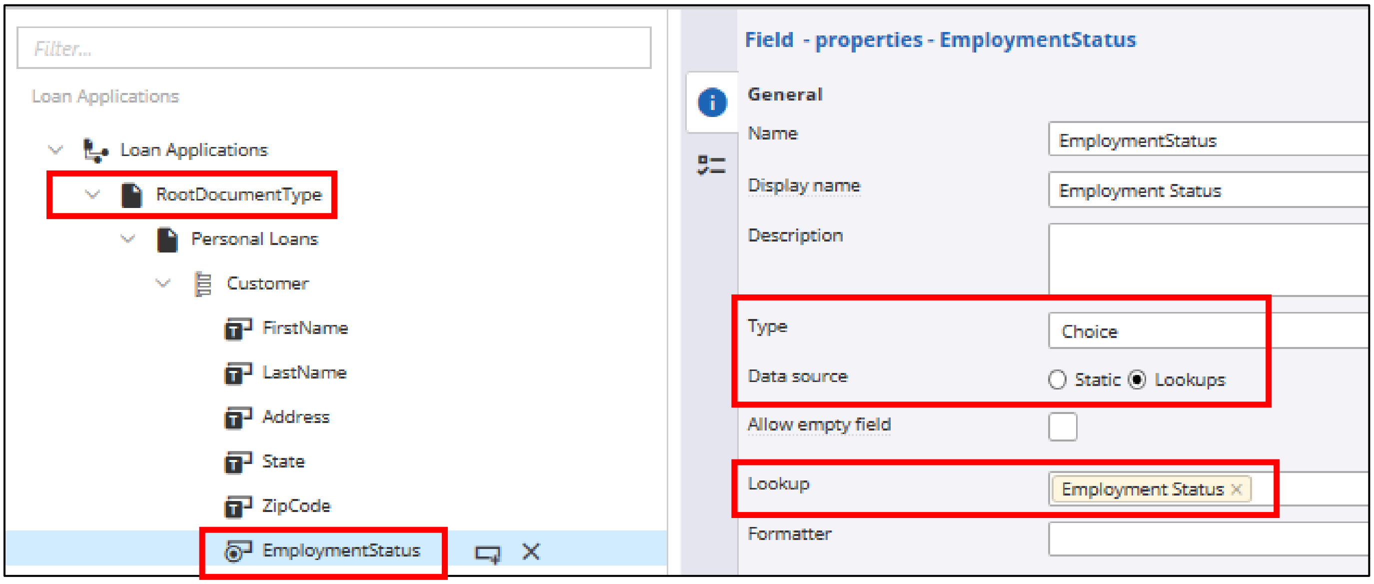
27. Configure the following **Lookup**.



Notes: (i) The Lookup has been added to the XYZ Bank category as it may be used in other non loan application related projects.
(ii) You can re-order the lookup items by clicking the up/down arrows.

28. Click **Save**.

29. Navigate to the open extraction group.
30. Expand the **Personal Loans** document.
31. Expand the **Customer** field group, and select the **EmploymentStatus** field.
32. From **Data source**, select **Lookups**.



33. From the **Lookup** dropdown, select the **Employment Status** (XYZ Bank category).
34. Click **Release** and click **No**.
    Note: You will receive a warning message asking if you want to re-release any associated classification groups. You can igore this message for now as we have not created any classication groups. We will cover this in a later part of the lab.
35. Click **Close and unlock**.
    Note: In a later lab you will modify the extraction group in a separate application called the Transformation Designer. The extraction group must be unlocked in the Kofax TotalAgility Designer, so that it can be configured in the Transformation Designer.

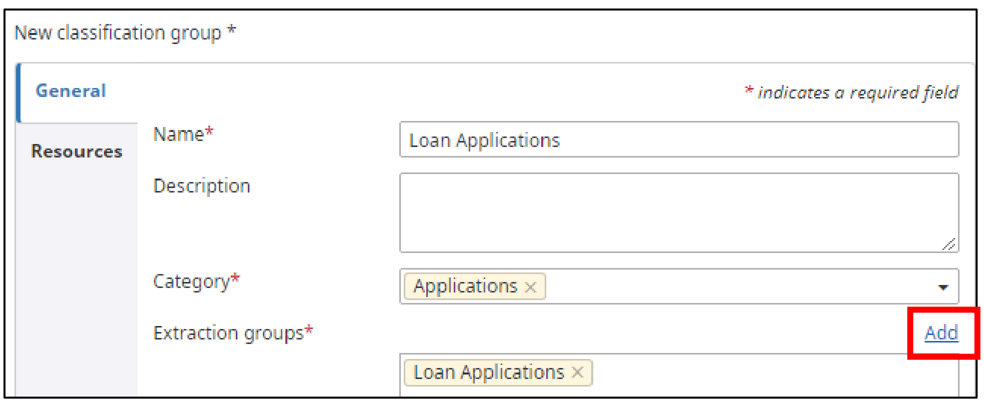
Lab 05-3

Create a Classification Group

Creating a Classification Group

In this part, you will create a Classification Group. Classification groups are a combination of one or more extraction groups. They are used by the scan process to determine what document type is being scanned. This gives flexibility as Extraction groups can be reused across multiple Classification groups.

1. From the **Main** menu navigate to **Capture > Classification groups**, and click **New**.
2. Enter **Loan Applications** as the classification group **Name.**
3. Click **Add** in the **Extraction groups** area.



4. Select **Loan Applications**, and click **Done**.
   Note: You can add more than one extraction group to a classification group. As an example, you may also have a requirement to have a proof of identity document type i.e. passport or driving license. You would create a separate extraction group for proof of identity and then add it to the Loan Applications classification group.
5. Click **Release**. You are returned to the Classification groups list page.
   Note: The Classification group is automatically unlocked.

Lab 05-4

Create a Folder

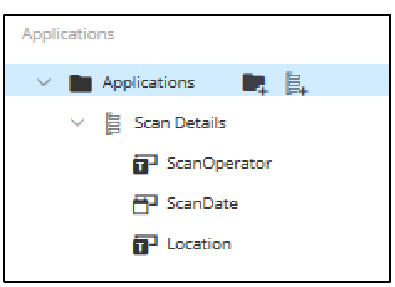
Creating a Folder

In this part, you will create a Folder. Folders are used to display common data across all Folders/Documents scanned together, such as the Scan Operator, Scan Date and Location, when a group of documents are scanned.

1. From the **Main** menu navigate to **Folders**, and click **New**.
2. Rename the **Root Folder** to **Applications**.
   Note: We are using a more generic name for the folder as it may be re-used for other types of non-personal loan related applications e.g. mortgages.
3. Click the **Add field group**. You can do this by clicking the icon to the right, or the button on the toolbar.
4. Enter **Scan Details** as the Field group **Name**.
5. Click **Add field**. You can do this by clicking the icon to the right, or the button on the toolbar.
6. Enter **ScanOperator** for the field **Name**, **Scan Operator** as the **Display Name**, and set **Type** to **Text**.
7. Add 2 additional fields and configure as shown, remembering to set the Formatter for ScanDate:

Name	Display Name	Type	Formatter
ScanOperator (already created)	Scan Operator	Text	
ScanDate	Scan Date	Date	Default Date Formatter
Location	Location	Text	

8. Your **Folder** should look like:



9. Click **Release**, and **Close and unlock** the folder.
10. Click **Refresh** to see the Folder.

Lab Notes

Folder Name

1. A folder **Name template** is set to **[FolderType]** by default**.** You can modify the folder name to e.g. append the scan operator name to the folder name by clicking the **Fields** dropdown. You can also choose the **CustomText** from the **Properties** dropdown and add your own custom text for the folder name.

Scan Resolution

2. Where possible, it is recommended to scan at 300dpi.

eVRS Settings

3. There are a number of advanced VRS settings that can be applied to an image. You can find examples of these in the online help by searching for eVRS.

Revision Questions

1. A fixed sheet separation profile with 2 sheets per document has been configured. A user scans or imports 5 sheets into TotalAgility. How many documents will be created?

2. Can you delete a Separation profile when the profile is associated with the capture properties of a design time process?

3. What is the purpose of a Scan/VRS profile?

4. Can you update a Scan/VRS profile without re-releasing any processes that use the profile?

5. What is an Extraction group?

6. If you make a change to an Extraction group e.g. add a new field, what else must you do to see the change at runtime?

7. Can Extraction groups be re-used in other Classification groups?

8. What is a Classification group?

9. A user creates a new Extraction group and clicks Save. Can you add the saved Extraction group to an existing Classification group?

10. What is a Folder?