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Kofax TotalAgility 7 Essentials
Course Overview

Course Overview
The focus of this course is to provide product training for Kofax TotalAgility 7, utilizing instruction and hands-on labs to develop administration and operation skills for the software. The result will provide technical skills necessary to become certified in Kofax TotalAgility 7. Attendees will be able to build a capture enabled case process incorporating separation, classification, extraction and validation capabilities.

This course is intended for technical professionals who need to understand how to install, configure, design, implement, and support the operation of capture enabled business process management solutions using Kofax TotalAgility. Learning is accomplished through presentations, demonstrations, and hands-on labs.

This course is designed to provide a comprehensive technical overview into the Kofax TotalAgility product, its functionality, configuration, and integration. During this course, the attendee will become familiar with process design features, case management concepts, and front end solution building.

At Course Completion
Upon completion of this course, students will be able to:

- Install and configure Kofax TotalAgility 7 (a recording of the installation is provided).
- Configure common Server Settings
- Understand the components that make up the Intelligent Automation Platform
- Exhibit competency using Kofax TotalAgility Designer
- Design a capture enabled process that will provide the ability to perform separation and classification, extraction , and validation
- Build a Case based process with standard process flow
- Enhance the process to implement Data Access, Document Creation and Email integration
- Build and customize a Web-based Forms solution
- Configure and use Import features such as Email, Watched Folders, Multi-Functional Peripherals (MFP)
- Optional topics include exporting data using the Text Export Connector, configuring Mobile and Scanners as Capture Input Sources, and creating and exporting a package
- Pass a Certification Examination with a score of 85% or higher

Prerequisites
To maximize the learning experience, it would be beneficial if the student had the following:
- Awareness of programming concepts (you do not have to write code in this course)
- Basic working knowledge of
    - SQL databases
    - Microsoft Internet Information Services (IIS) Manager

Course Materials
- All course materials are provided

Hours
- Classroom: 8:30 to 4:30 each day for four days (Fri am – Certification exam)

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Course Outline

Module 1- Introduction to the Kofax TotalAgility 7 Essentials Course
- Classroom Environment
- Course Materials, Software, and Hardware
- Course Roadmap
- Course Objectives
- Use Case Scenario
- Exam Registration
- Introduction to Kofax, Inc.
- What is Kofax TotalAgility?
- Single Platform for Smart Process Applications
    - Business Process Management
    - Dynamic Case Management
    - Mobility Services
    - Capture Services
    - Transformation Services
    - Awareness and Collaboration Services
    - Analytics & Business Intelligence Services
    - Data Integration Services
- LAB: Course Pre-Requisites

Module 2 – Install Kofax TotalAgility 7 (Recorded Demo)
- A recording of the installation procedure is provided in the course and should be watched by those who are responsible for the installation. The installation will not be carried out in a classroom setting. A detailed lab guide is also provided for anyone who needs to install TotalAgility.
- Installation Prerequisites
    - Hardware Requirements
    - Software Requirements
    - Server Operating System
    - .NET Framework
    - Microsoft IIS
    - MS SQL Server
    - TCP/IP Protocol
    - Database user
    - Transformation Server user
- Installation steps
- Confirming Services and Applications after Installation
- Uninstall Service Pack/Hotfix, Repair an Installation
- LAB: Installing Kofax TotalAgility 7

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Module 3 – Create a Capture Workflow Process
- Overview
- Process Designer
- Basic Process Features, Naming, Properties
- Design a Process with Classification, Document Review, Extraction, and Validation
- Moving Activities, Connecting Activities
- Auto Align a Process
- Save, Release, and Close
- Lock, Unlock a Process
- Create a Category
- Assign a Process to a Category
- Search for a Process
- Demo
- Lab

Module 4 – Create Resources
- What are Resources?
- Resources Designer
- Create a Resource and Group Resource
- Basic Workflow Rules
- Assign a Resource to a Manual Activity
- Assign Capture Runtime Permissions
- Set Working Category
- Persona's (Self Learning)
- Demo
- Lab

DAY 2

Module 5 – Configure a Separation Profile, Extraction Group, Classification Group, and Folder
- Overview
- Data Designer
    - Separation Profiles
    - Document and Folder Level Separation
    - Create a Separation Profile – Document and Folder
- Extraction Group
    - What is an Extraction Group?
    - Create an Extraction Group
    - Create Fields Groups and create Document Types
    - Demo
    - Lab
- Classification Group
    - What is a Classification Group?
    - Create a Classification Group
    - Add an Extraction Group to a Classification Group
    - Demo

- Lab
- Folder
  - What is a Folder?
  - Create a Folder and create Folder Fields
  - Demo
  - Lab

Module 6 – Capture Process Properties, Process Variables, and Capture Activity Configuration
- What are Variables?
- Configure Process Capture Properties – Initialize from Scan, Classification group, and Separation
- Create Variables – Document and Folder
- Classification Activity Configuration
- Document Review Activity Configuration
- Extraction Activity Configuration
- Validation Activity Configuration
- Configure an Activity SLA
- Demo
- Lab

Module 7 – Site, Forms, and Navigation
- Overview
- Kofax TotalAgility Workspace
- Form Designer Module
- Create a Site (website)
- Create a Manual Logon form
- Create a Scan Create New Job Form
- Create Activity Forms
- Add Site Navigation
- Access a Site and Forms
- Demo
- Lab

Module 8 – Introduction to Transformation Designer/Classification
- Overview
- Project Types - Classification, Extraction and Shared
- Opening Projects
- Connection to Kofax TotalAgility Extraction and Classification Groups
- Classification
  - What is Classification?
  - Layout Classification and Configuration
  - Document Sets
  - Assign Sample Documents to Classes
  - Layout Classification Setup
  - Training
  - Test Classification

- Classification Online Learning
- Test Online Learning
- Demo
- Lab

Module 09 – Extraction
- What is Extraction?
- Document Sets
- Available Locator Methods
- Locator Properties
- Configure the Advanced Zone Locator
- Cleanup Profiles and Anchors
- OMR Group Zones
- Map Locator Values to Extraction Fields
- Barcode Locator
- View Extraction Results
- Test Extraction
- Anchors (Self Learning)
- Demo
- Lab

Module 10 – Case a Case Based Process
- Case v Business Process
- Case and Process Design Components, Configuration, Implementation
    - Categories
    - Activity Types
- Loan Application Use Case Scenario
- Demo
- Lab

DAY 3

Module 11 – Variables and Data Access
- Process Variables
- Server Variables
- System Variables
- Document Variables
- Folder Variables
- Data Access
    - Creating a real-time connection to an External Database
    - Different Types of Database access (Table, Stored Procedure, View)
- Import New Version of Loan Application process
- Demo
- Lab

Module 12 – Build Forms, Navigation, and Security
- Building forms for the Loan Application Process
- Changing Navigation
- Navigation Security
- Form Security
- Demo
- Lab

Module 13 – Email Notifications and Document Creation
- Activity and Email Notifications
- Document Creation
- Test Email Notifications and Document Creation
- Demo
- Lab

Module 14 –Customize Forms
- Customizing Forms
  - Adding controls (Rows/Columns, Dropdown list and Web Capture control)
  - Repositioning and resizing controls
  - Modifying and adding Form Actions
  - Adding Images, Themes (Self Learning)
  - Configure Redirect Behavior (Self Learning)
- Demo
- Lab

DAY 4

Module 15 – Loop through Documents in a Folder
- Connect the Capture Applications Process to the Loan Process
- Loop Activity
- Create New Job Activity
- Demo
- Lab

Module 16 – Configure Email and Watched folders as Capture Input Sources
- Configuring Email Integration
- Configuring Watched Folders Integration
- Demo
- Lab

Module 17 – Optional - Exporting to Systems of Record
- Text Export Connector
  - Downloading and Installing the Connector
  - Configuring the Process
  - Configuring the Export Connector
- Demo

- Lab

Module 18 – Optional - Configure an MFP Device as an Capture Input Source
- Creating the Device Create New Job form
- Configuring the process with a Precondition
- Managing Devices
- Download and install the Multi-Functional Peripherals (MFPs) Emulator
- MFP Emulation
- MFP Starter Pack
- Demo
- Lab

Module 19 - Optional – Configure a Mobile Device as a Capture Input Source
- Configuring the Device Create New Job form
- Mobile Devices and the Mobile App
- App Settings: Connecting to the Kofax TotalAgility Server
- Demo
- Lab

Module 20 - Optional – Configure a Scanner as a Capture Input Source
- Scanners
  - Downloading and the Scanner Driver
  - Accessing the Scanner from the Scan Create New Job form
- Demo
- Lab

Module 21 - Optional – Export Solution as a Package
- Create Package
  - Add items to package
  - Save and export package
- Demo
- Lab

Module 22 – Optional - Debugging
- Debug a process
- Debug a form
- Demo
- Lab

Module 23 – Review and Testing
- Class Review
- Overview of the Exam Environment and Exam structure

Day 5

- Logging into the Exam Server
- Certification Testing