

Resources

Work Like Tomorrow.™

KOFAX

Resources and Basic Workflow Rules



- Users must be registered in TotalAgility
- Import from Network e.g. Active Directory
 - Synchronise AD using scheduled process/Job scheduler
- Manually create workers or groups
- Can have subgroups
- Assign resources to activities
 - Basic workflow rules apply by default
- Cant delete a resource if it is in use

Basic Workflow Rules



- Basic workflow rules?
 - If assigned to a group all group members see the activity
 - First to take, removes from others queues
 - What if a new resource is added to an existing group?
- Same As Previous
 - Set an activity to be performed by a resource that completed a previous activity
 - Job creator/previous activity, any previous activity, Supervisor

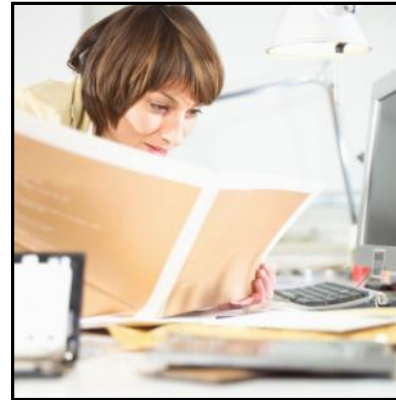
Users and Groups

- A resource is a person or a group of people who work in an organization required to perform an activity in a business process
- Use the Resources menu to create a resource or a resource group, and to add external resources to your system
- You can have subgroups within groups
- When a task is assigned to a group, any resource from that group or group subgroups can perform the task



Why Use Resources?

- Even though organizations have automated, interconnected and streamlined a lot of their business processes, human resources are still needed to complete a number of important steps in core business processes.
- For example, you would need a human resource to do the following manual tasks, e.g. APPROVE a loan, ASSESS a medical insurance claim, SCAN a document, etc.



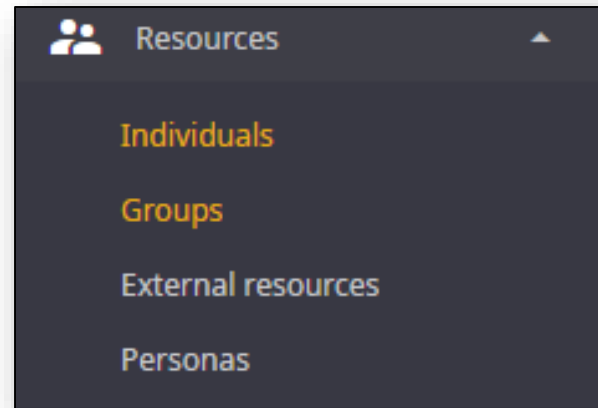
Examples



- Resources are required to perform manual tasks like:
 - Reviewing reports
 - Assessing a claim
 - Scanning in legal documents
 - Posting(Mailing) out forms
 - Making human decisions like diagnosing a patient
 - Deciding the outcome of an insurance claim

Create a Resource

- From the **Main** menu navigate to **Resources**
- Select **Individuals**, **Groups**, or **External Resources** (e.g. contractor) and click **New**



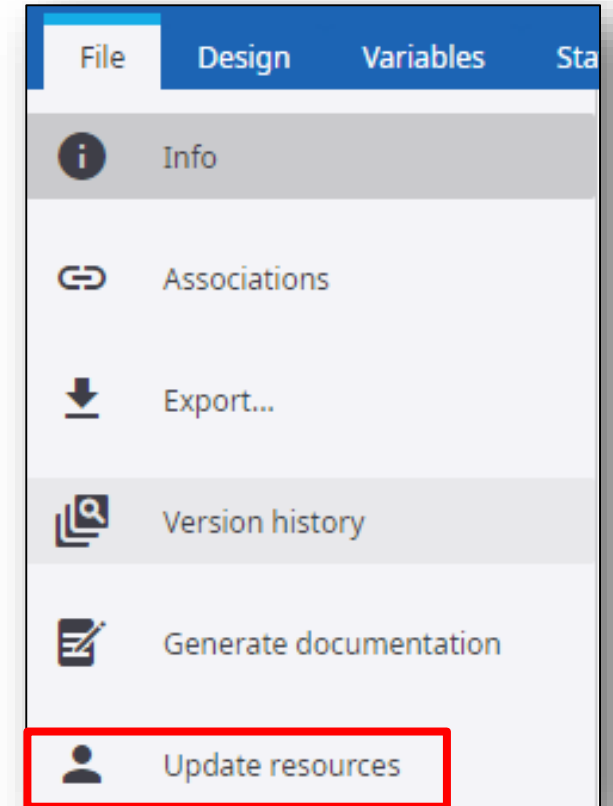
Modifying Group Membership



- New group members will automatically see any pending activities that are assigned to the group
- A re-release of the process is unnecessary

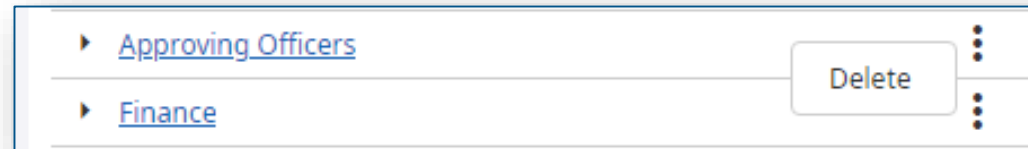
Using the Update Resources command

- Enables you to update the resource information of all manual activities in the current process without having to re-release the process
- Enables you to change the resource assigned to an activity even if the process you are modifying has live jobs running
- For example, you may need to replace the resource currently allocated to an activity with a resource of a higher skill level. Using this command, you can apply this resource change to the current process without affecting the process version:
 - Open the relevant process and make the desired resource changes.
 - From the Ribbon, select the File tab and click Update resources



Delete a Resource

- You cannot delete a resource if that resource is in use by ANY process (or job) within Kofax TotalAgility
- The resource would have to be removed from any activities in associated processes before they can be deleted from Kofax TotalAgility
- To delete a resource, select the redundant resource in the list page and select the **Delete** option from the **vertical ellipses**



Assign Resources

- Individual resources / resource groups are assigned to activities using the Resource assignment tab in the properties of an ordinary activity
- Resources can be either:
 - Static
 - Assigned at design time
 - Dynamic
 - Use a variable which can be populated with a resource at run time

> Activity - validation

Activity assignment

Allocate manually ☐

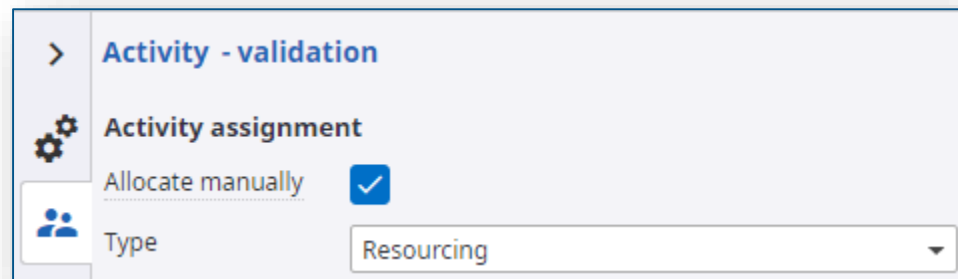
Type

Resources [Add](#)

Validation Operators (Group) ×

Manually Allocate Resources

- Manual resource allocation is the process of manually allocating resources to an activity at run time
- The **Allocate manually** property (Resource assignment tab) can be used at design time to enable manual resource allocation
- This can be useful when e.g. a supervisor needs to allocate a resource from their team to an activity while the job is running
- The Kofax **TotalAgility Workspace** (or API calls) can be used to allocate a resource to an activity at run time



Active Directory Synchronization

- Use the SYSTEM Active Directory Synchronization process to synchronize the Active Directory (AD) resources with Kofax TotalAgility
- This process synchronizes organizational units and their associated groups and users within the Active Directory
- It does not synchronize any containers, objects, or users outside of an organizational unit
- More detail on AD Synchronization can be found in the SPA course



Change the values of the server variables, in particular, AD_SERVERNAME, AD_USERNAME, AD_PASSWORD, and AD_EMAIL_ADMINISTRATOR, to suit the requirements of your organization.

Advanced Workflow Rules

- Apply rules if resource requirements for an activity are complex
- For example, apply rules if more than one resource is required to review and approve a document
 - By applying rules, you can group the reviews as a single activity with multiple resources, rather than separate activities with different resources



You will not cover Advanced Workflow Rules in this course. Advanced Workflow Rules are covered in the SPA course