

Export a Solution as a Package

Work Like Tomorrow.™

KOFAX

Packages

- You can package the elements of a solution into a single package
- Process Elements
 - Processes (and associated processes)
 - Folder types, Extraction groups, Classification groups and Project data
 - Resources and Server variables that are used by a process
- Site and Form Elements
 - Sites and Forms
 - Images, Style sheets, Themes, Navigation, Custom Pages
 - Global Variables
- DLLs

Packages



- Resources
 - Personas, Resource and Resource Groups, Work Allocation Rules
- Data
 - Checklists, Word Templates, Extraction Groups, Classification Groups, Folder Types, Field Formatters, Lookups, Regular Expressions, Work Types, Job Queries, Work Type Queries
- Business Monitoring
 - Events, Targets, and Alerts
- System
 - Categories, Job Schedules
 - Scan/VRS Profiles, PDF Generation Profiles, Separation Profiles, Document Conversion Profiles

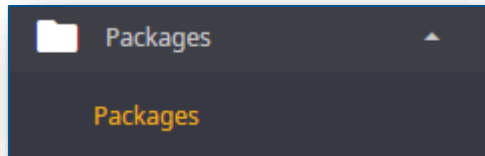
Packages



- A package can be saved in TotalAgility and exported as a single zip file
- Packages can be imported/exported and compared against other packages for differences
- You can import selected items from a package

Create a Package

- From the **Main** menu navigate to **Packages > Packages** and click **New**
- Click the **Add** button to add items or **Search** to search for items

A screenshot of a software interface for creating a package. The top bar has tabs: 'File', 'Package' (selected), 'Deployment configuration', and 'Export options'. Below the tabs are buttons for 'Add' (highlighted with a red box) and 'Search'. To the right of these buttons is an 'Artifact' dropdown menu set to 'All'. The main area is divided into two panes. The left pane contains a table of items to be added to the package. The right pane shows the 'Package - properties - Loan Applications' configuration, including fields for Name, Description, Category, and Comments, as well as checkboxes for content settings.

Name	Type	<input type="checkbox"/> Protected	
Capture Applications	Process	<input type="checkbox"/>	×
Loan Application	Process	<input type="checkbox"/>	×
LA_CreateNewLoanApplication	Form	<input type="checkbox"/>	×
LA_LoanApproval	Form	<input type="checkbox"/>	×
LA_GenerateRejectionLetter	Form	<input type="checkbox"/>	×
LA_PostForms	Form	<input type="checkbox"/>	×
LA_WaitForForms	Form	<input type="checkbox"/>	×

Package - properties - Loan Applications

Name: Loan Applications

Description: [Empty text area]

Category: Applications

Comments: [Empty text area]

Content settings

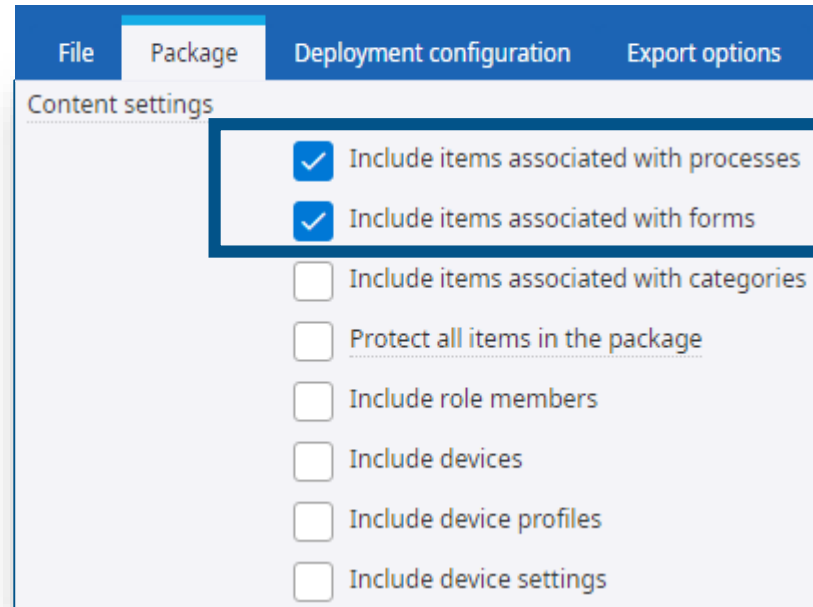
- ☒ Include items associated with processes
- ☒ Include items associated with forms
- ☐ Include items associated with categories

Package Content Settings



- If you add a process/form to a package, you can choose to include the items associated with the processes/forms
- This can include:
 - Categories
 - Associated Processes
 - Resources
 - Server Variables
 - dll's
 - Lookups etc.

Package Content Settings (Package tab)



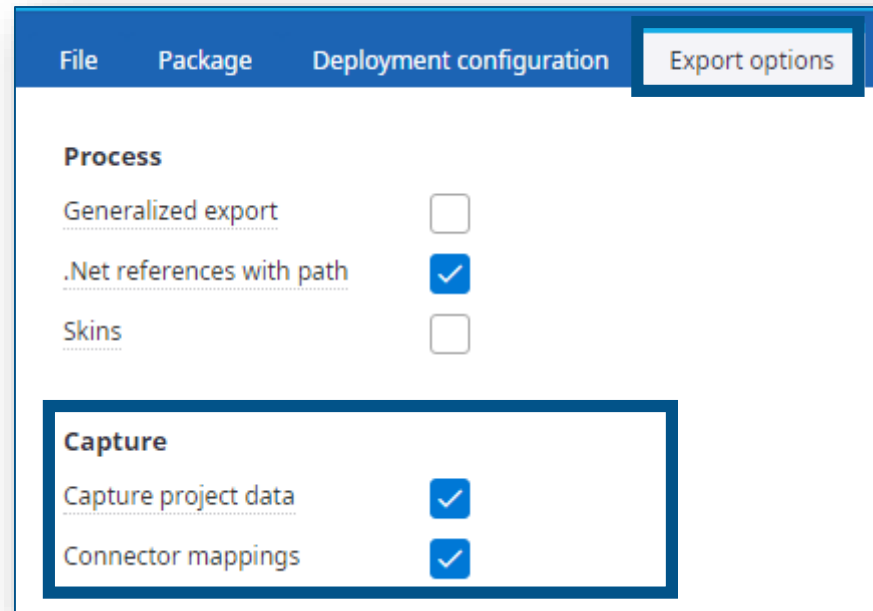
The screenshot shows a software interface with a blue header bar containing four tabs: "File", "Package", "Deployment configuration", and "Export options". The "Package" tab is selected. Below the tabs is a section titled "Content settings" with a list of seven options, each with a checkbox. The first two options, "Include items associated with processes" and "Include items associated with forms", are checked and highlighted by a blue rectangular box. The remaining five options are unchecked.

Option	Status
<input checked="" type="checkbox"/> Include items associated with processes	Checked
<input checked="" type="checkbox"/> Include items associated with forms	Checked
<input type="checkbox"/> Include items associated with categories	Unchecked
<input type="checkbox"/> Protect all items in the package	Unchecked
<input type="checkbox"/> Include role members	Unchecked
<input type="checkbox"/> Include devices	Unchecked
<input type="checkbox"/> Include device profiles	Unchecked
<input type="checkbox"/> Include device settings	Unchecked

Export Options

- You can also choose to include capture project data e.g.
 - Classification and Extraction Projects
 - Learning (Classification/Extraction set)
 - Project Settings
 - Locators
 - Knowledge Base files
 - Test sets are not exported, only a reference to the location of the test set(s). If the Test Set location cannot be reached, you can choose to remove the reference on import
- You can also include Connector Mappings

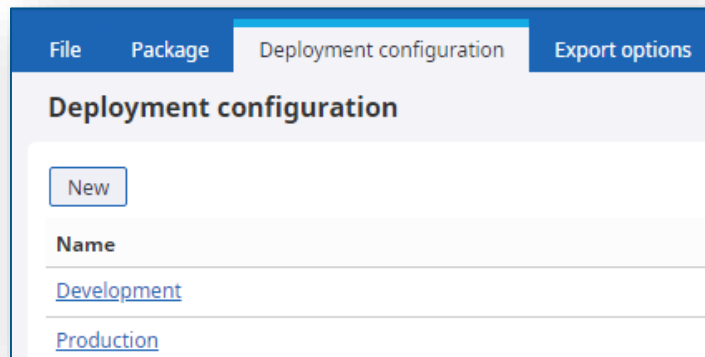
Export Options Tab



File	Package	Deployment configuration	Export options
Process			
Generalized export		<input type="checkbox"/>	
.Net references with path		<input checked="" type="checkbox"/>	
Skins		<input type="checkbox"/>	
Capture			
Capture project data		<input checked="" type="checkbox"/>	
Connector mappings		<input checked="" type="checkbox"/>	

Deployment Configuration

- You can save different deployment configurations using the Deployment Configuration link e.g.
 - Development
 - QA
 - Production



The image displays two screenshots of the 'Edit deployment' form. The top screenshot shows the 'Development' configuration, and the bottom screenshot shows the 'Production' configuration. Both forms include a 'Name' field (marked with an asterisk as required), a 'Description' field, and a 'Configuration' section with tabs for 'Server variables', 'Global variables', and 'Web services'. The 'Global variables' tab is active in both, showing a table with 'Name' and 'Value' columns.

Development Configuration:

Name	Value
CUSTOMER DATABASE	Data Source=localhost;Initial Catalog=Customer;Integrated Security=SSPI

Production Configuration:

Name	Value
CUSTOMER DATABASE	Data Source=cta-train;Initial Catalog=Customer;Integrated Security=SSPI

Package Comparison

- You can compare packages for differences
- From the **Main** menu navigate to **Packages > Packages** and click **Compare**

The screenshot shows the 'Compare' window in the Kofax software. The window has a blue header with 'Compare' and 'Import options' tabs. Below the header, there's a 'Package' section with a 'Browse...' button and a file named 'Loan Application V2 (3).zip' (0.2 MB) with a 'Ready to upload' status. To the right, there's a 'Compare with' section with two radio buttons: 'System' (selected) and 'Other package'. Below this, there's a 'Version' field with the value '7' and a 'Comments' field. The main area of the window displays two side-by-side tables of artifacts. Both tables have columns for 'Name', 'Artifact', 'Version', and 'Last modified date'. The left table has a 'Total' view selected, and the right table has a 'Total' view selected. Both tables list 16 artifacts, including 'Capture Applications', 'Loan Application', 'LoanConfirmation.dotx', 'Capture Applications_Document Review_Docu...', 'Capture Applications_Validation_Validation', 'LA_GenerateRejectionLetter', 'LA_WaitForForms', 'LA_LoanApproval', 'Capture Applications_Scan', 'LA_CreateNewLoanApplication', 'LA_PostForms', 'SESSION_ID', 'WORKQUEUE_FORM', 'EPC', and 'JOB_ID'. At the bottom of the window, there's a summary bar showing 'Total: 36', 'Difference: 0', 'New: 0', and 'Same: 36'.

Compare Import options Import package Import selected items

Package Loan Application V2 (3).zip 0.2 MB Ready to upload

Compare with ☒ System ☐ Other package

Version 7

Comments

Artifact All View Total

<input type="checkbox"/>	Name	Artifact	Version	Last modified date
<input type="checkbox"/>	Capture Applications	Process	11	11/03/2019 12:54:38
<input type="checkbox"/>	Loan Application	Process	19	15/03/2019 14:11:43
<input type="checkbox"/>	LoanConfirmation.dotx	Asset		11/08/2016 14:40:02
<input type="checkbox"/>	Capture Applications_Document Review_Docu...	Form	1	07/03/2019 11:18:00
<input type="checkbox"/>	Capture Applications_Validation_Validation	Form	1	07/03/2019 11:17:54
<input type="checkbox"/>	LA_GenerateRejectionLetter	Form	1	07/03/2019 15:54:33
<input type="checkbox"/>	LA_WaitForForms	Form	1	07/03/2019 15:54:33
<input type="checkbox"/>	LA_LoanApproval	Form	3	08/03/2019 09:59:03
<input type="checkbox"/>	Capture Applications_Scan	Form	1	07/03/2019 11:11:05
<input type="checkbox"/>	LA_CreateNewLoanApplication	Form	2	07/03/2019 16:03:24
<input type="checkbox"/>	LA_PostForms	Form	1	07/03/2019 15:54:33
<input type="checkbox"/>	SESSION_ID	Global variables		06/03/2019 16:07:04
<input type="checkbox"/>	WORKQUEUE_FORM	Global variables		06/03/2019 16:07:04
<input type="checkbox"/>	EPC	Global variables		06/03/2019 16:07:04
<input type="checkbox"/>	JOB_ID	Global variables		06/03/2019 16:07:04

Total: 36 Difference: 0 New: 0 Same: 36

Package Export



- Either
 - From the **Main** menu navigate to **Export...** and select **Package** from the dropdown list
 - From the **Main** menu navigate to **Packages** and in the list page select the : and from the **Context** menu **Export**
- Select the **Deployment** type and click **OK** and **Yes**
- A zip file is generated in the **Downloads** folder in Google Chrome

Package Import

- From the **Main** menu navigate to **Import...** and click **Browse**
- Select and open the package, and select **Import** or **Import selected items**

Import

File to import

Capture Applications.zip
0.1 MB
Ready to upload

The file you have selected contains a package

Artifact

<input checked="" type="checkbox"/>	Name	Artifact	Version	Last modified date	Value	Action
<input checked="" type="checkbox"/>	Default Category	Category		06/11/2018 10:42:00		
<input checked="" type="checkbox"/>	Applications	Category		06/11/2018 11:34:38		
<input checked="" type="checkbox"/>	Default Transform...	Thread Pool				
<input checked="" type="checkbox"/>	Default Thread Pool	Thread Pool				
<input checked="" type="checkbox"/>	Capture Applicati...	Form	1	06/11/2018 11:45:34		
<input checked="" type="checkbox"/>	Capture Applicati...	Form	1	06/11/2018 11:45:35		
<input checked="" type="checkbox"/>	Capture Applicati...	Form	1	06/11/2018 11:45:18		
<input checked="" type="checkbox"/>	LogonForm	Form	1	06/11/2018 11:45:25		
<input checked="" type="checkbox"/>	WorkspaceMenu	Navigation		06/11/2018 11:46:33		
<input checked="" type="checkbox"/>	xyzbank	Site		06/11/2018 11:45:57		
<input checked="" type="checkbox"/>	TotalAgility Works...	Theme		23/03/2018 18:55:53		
<input checked="" type="checkbox"/>	SESSION_ID	Global Variable		06/11/2018 10:42:36		Update

Form import options

☐ Security tokens

☐ Security roles

☐ Security role members

Overwrite options

☐ Overwrite all

☐ Role members

☐ Server variables

☐ Global variables

☐ Web service references

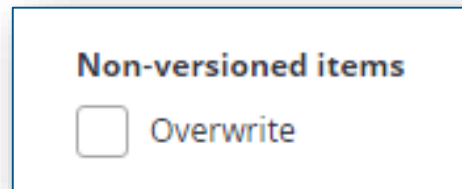
☐ Devices

☐ Device profiles

☐ Device settings

Import Non-Versioned Items

- You can choose to import non-versioned items (if these already exist on the target machine)
- Non-Versioned Items include: Checklist, Lookups, Scan VRS Profiles, PDF Profiles, Separation Profiles, WQ Definitions, Work Allocation Rules, Events, Targets, Alerts, Themes, Navigations, Sites, Document Templates, .NET References, Stylesheets, Images, Custom Pages, Localization Strings, Personas and Formatters.

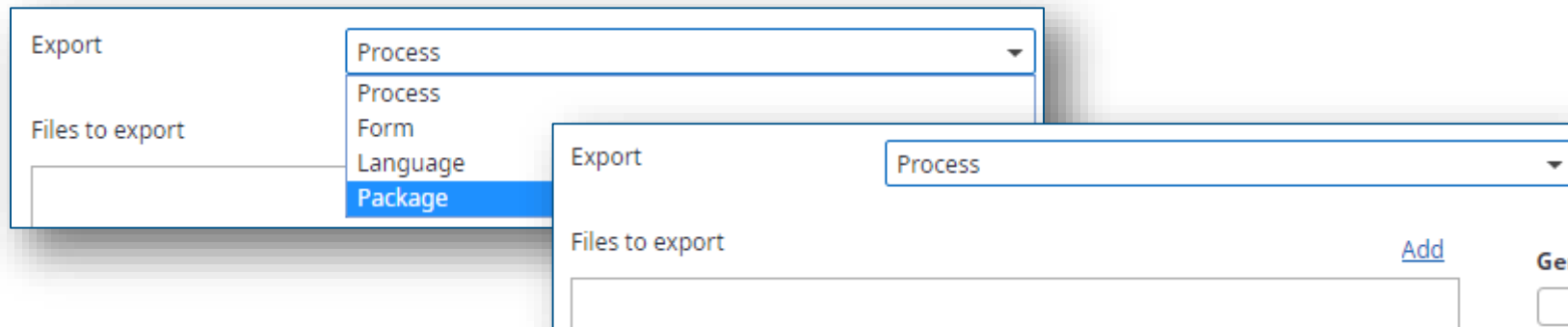


Non-versioned items

☐ Overwrite

Export Individual Processes or Forms

- From the **Main** menu navigate to **Export...** and select **Process or Forms** from the dropdown list
- Click **Add**
- Select the Processes or Forms and click **Done**
- Click **Export**



Import Individual Processes or Forms



- From the **Main** menu navigate to **Import...**
- Click **Browse**
- Navigate to the zip file and click open
- Click **Import**