Introduction to the Designer

Kofax TotalAgility Designer and Workspace

- To access the **Designer** enter: http(s)://servername/TotalAgility/Designer
- To access the TotalAgility **Workspace** enter: http(s)://servername/TotalAgility/Forms
- You can configure common System settings after installation using the Designer

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Server Configuration Settings after Installation

- After Installation it is recommended to configure high-level system settings
- From the **Main** menu click **System > System settings**
  - Email server (SMTP) settings
  - Session timeout and Timeout warning period for user
  - Batch session timeout (open capture activities)
  - Multiple logons (checked/unchecked)
  - Archive mode (Automatic/Manual)
  - Disable logon without password (checked/unchecked)
  - Use business calendar (checked/unchecked)
  - Process node colors
- You will be required to restart **TotalAgility Core Worker Service, TotalAgility Streaming Service, and TotalAgility IIS Application Pool**

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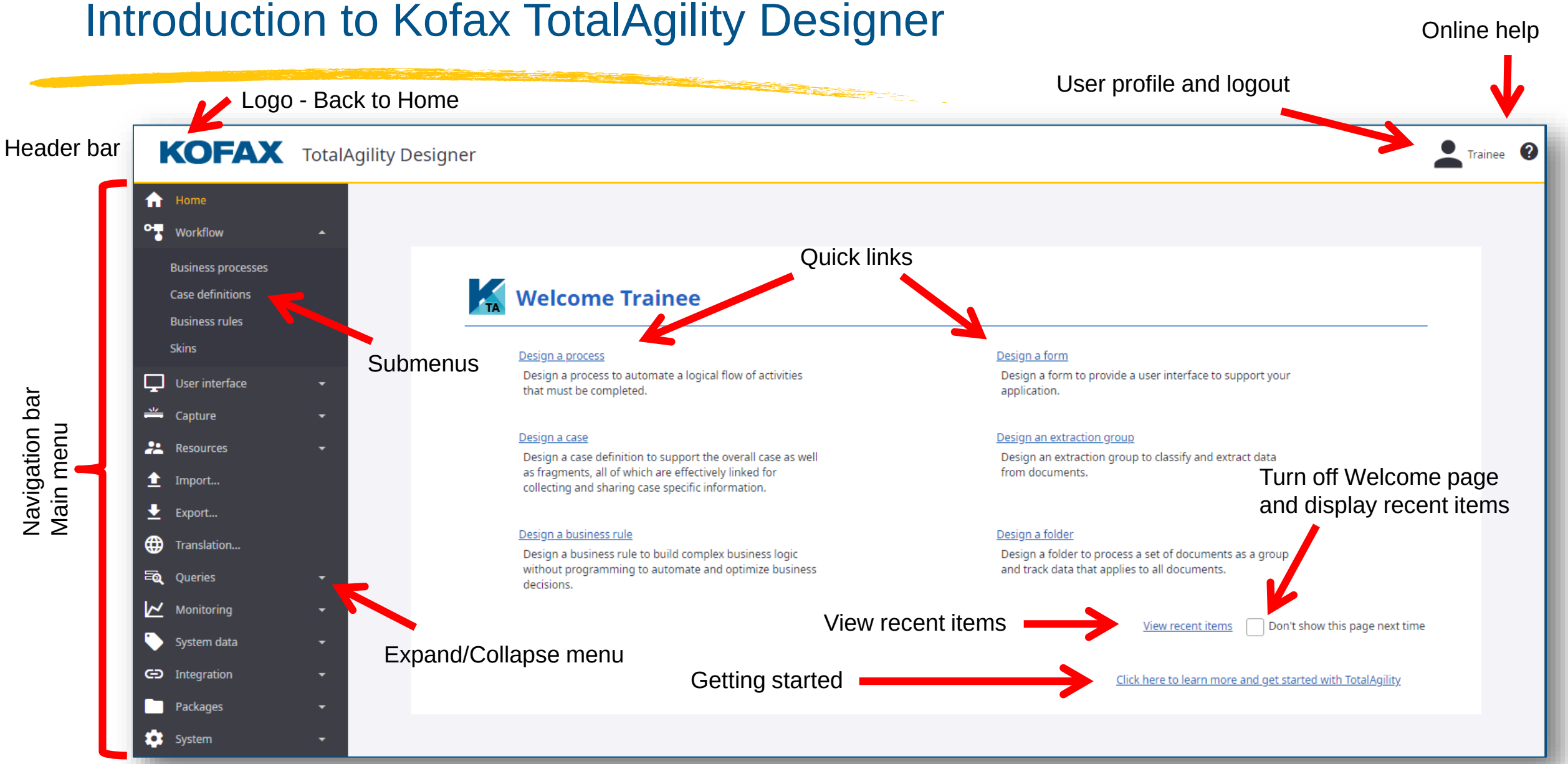
Introduction to Kofax TotalAgility Designer



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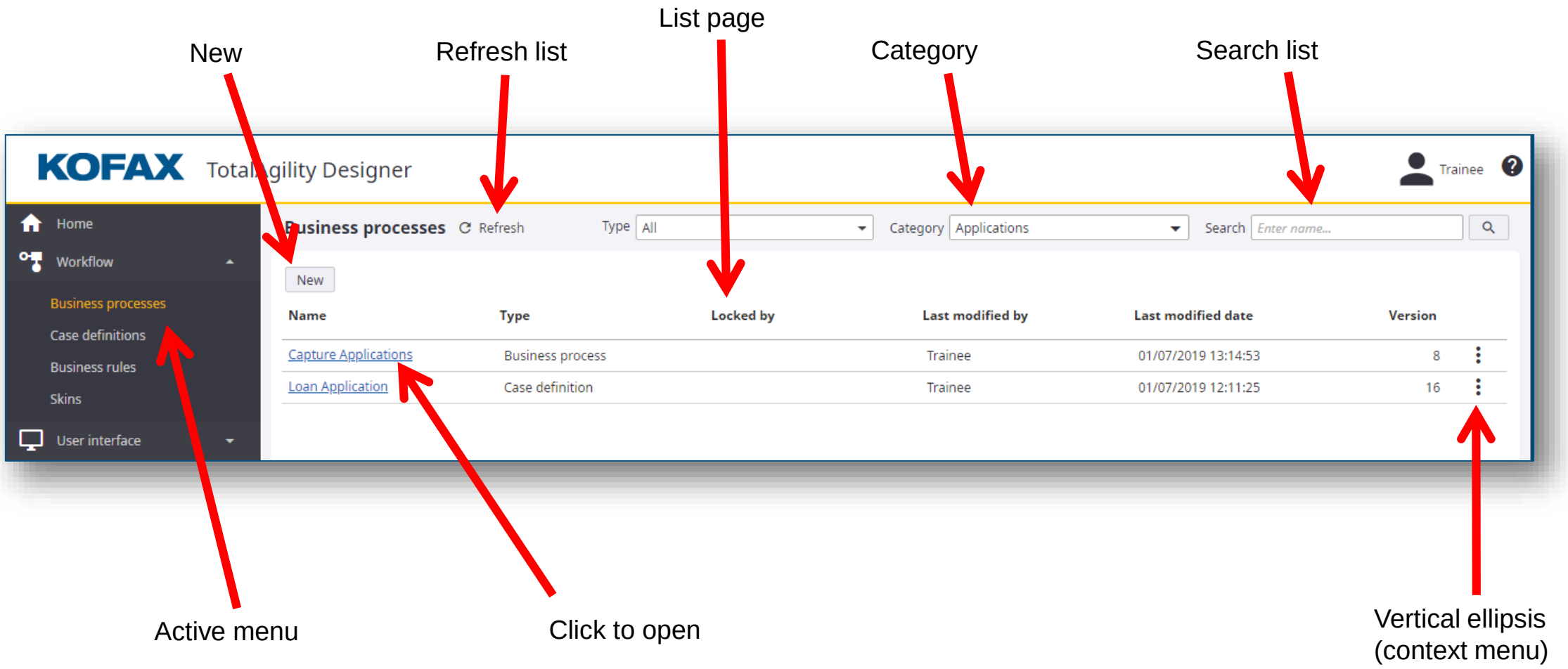
Workflow > Business processes



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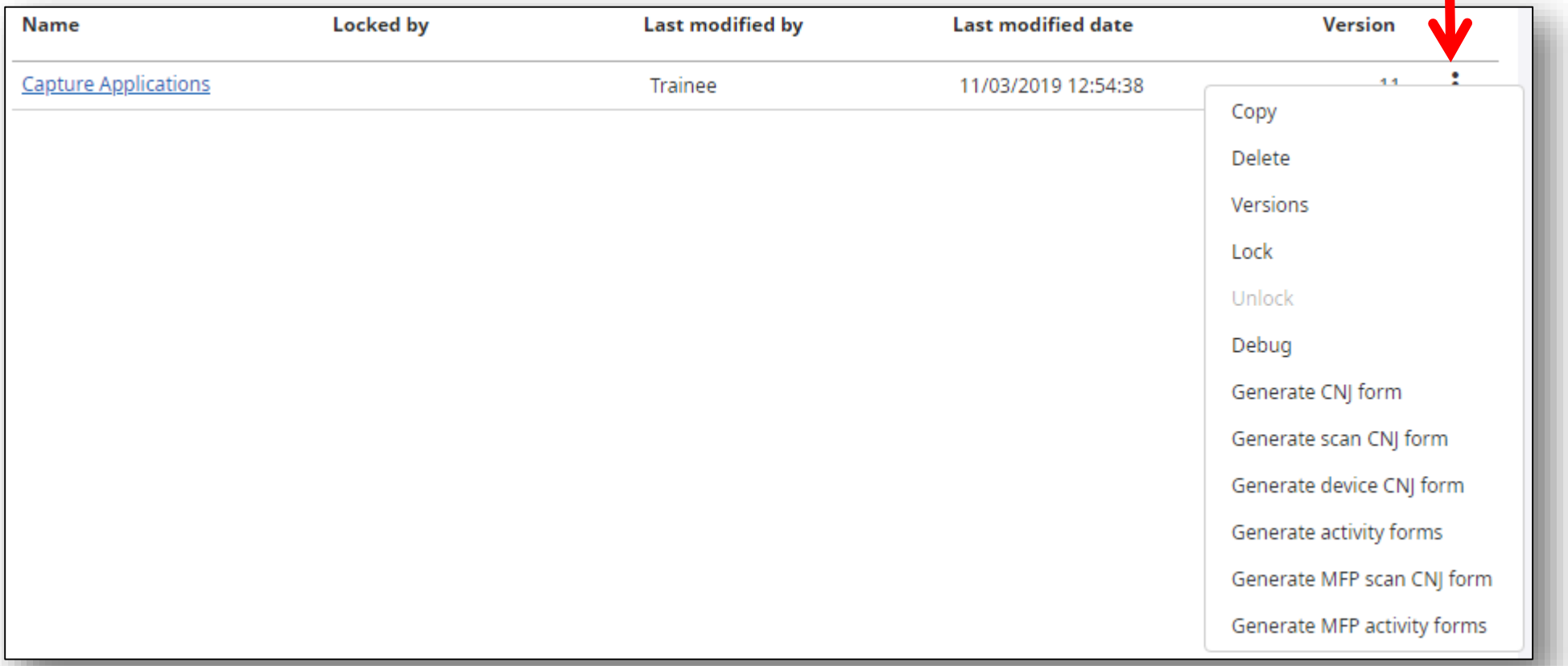
Vertical ellipsis – Context menu

Vertical ellipsis
(context menu)



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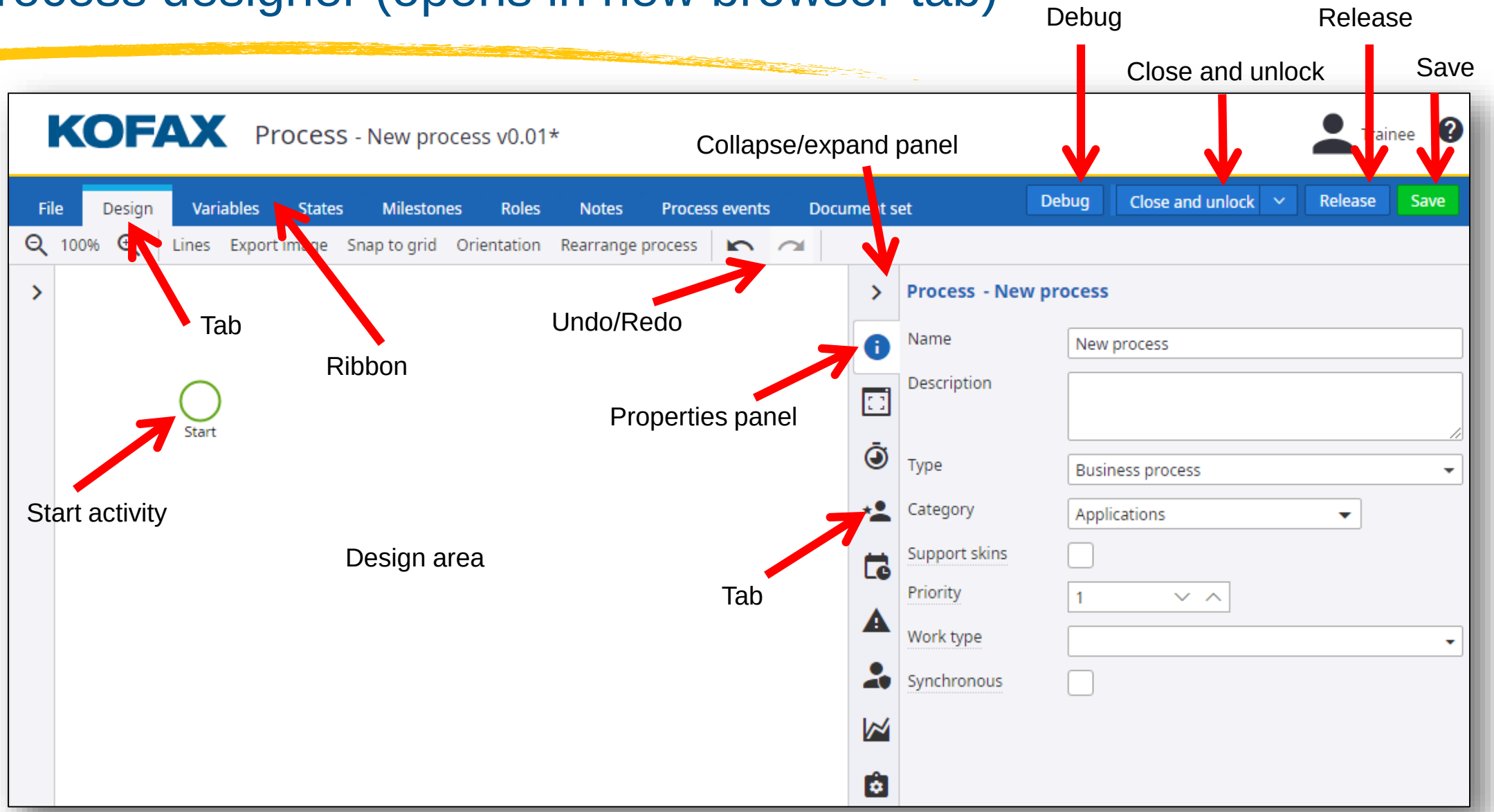
Process designer (opens in new browser tab)



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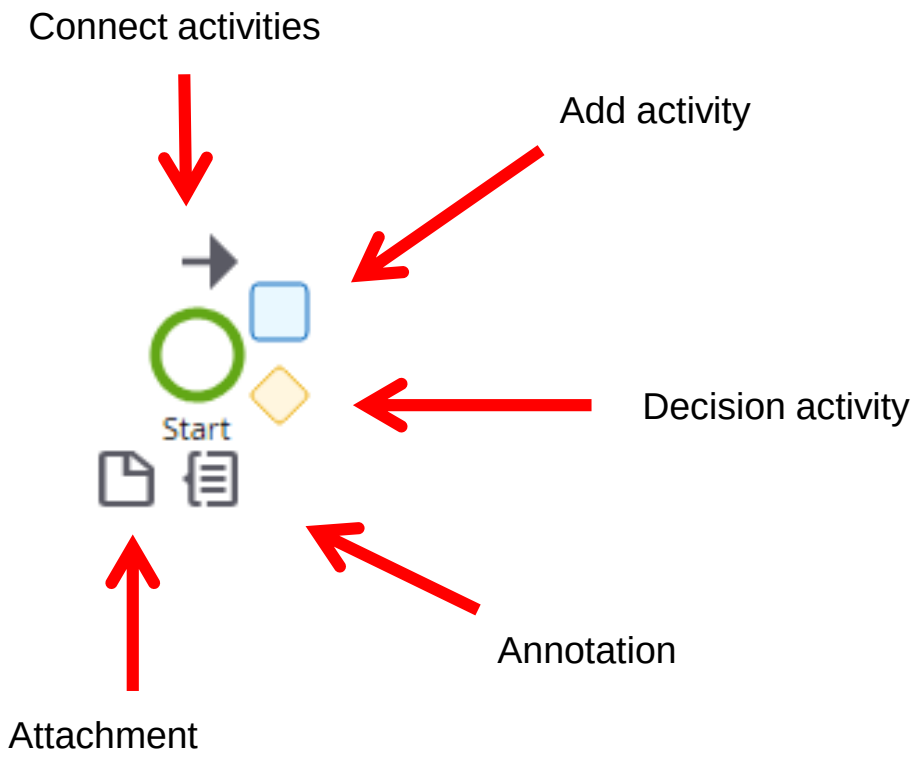
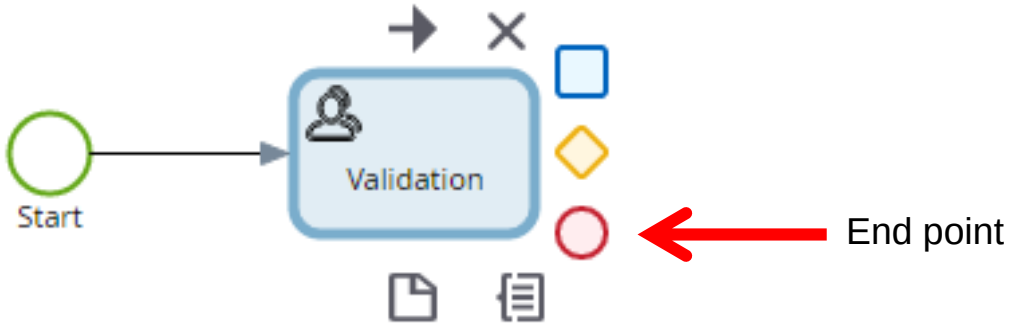
Satellite Activities





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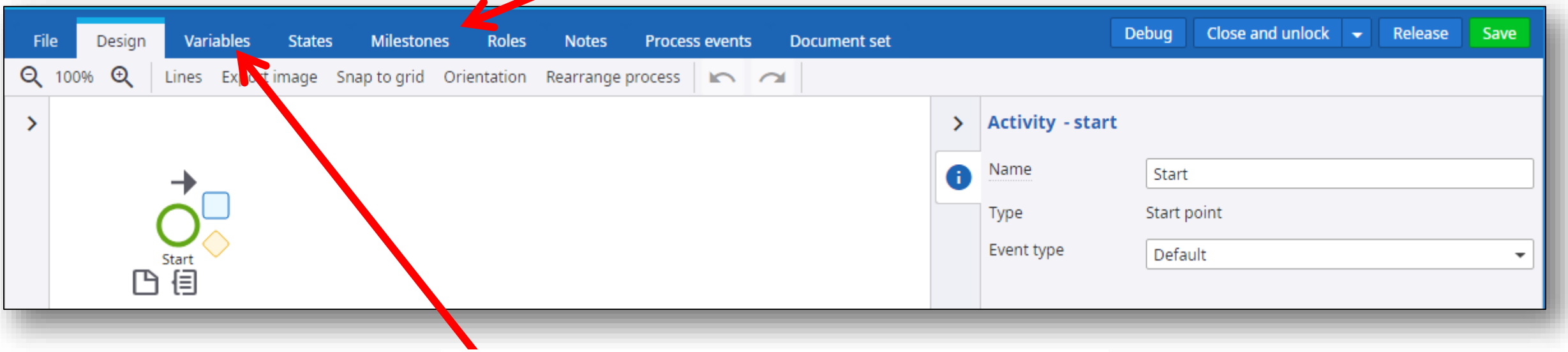
The Ribbon

Ribbon



Tabs to create/edit process items

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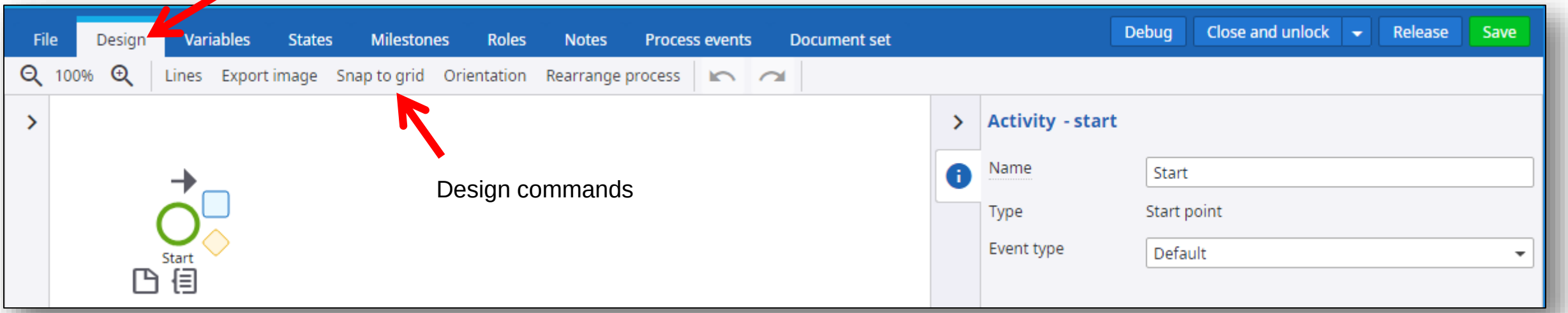
The Design tab

Design tab



Design commands

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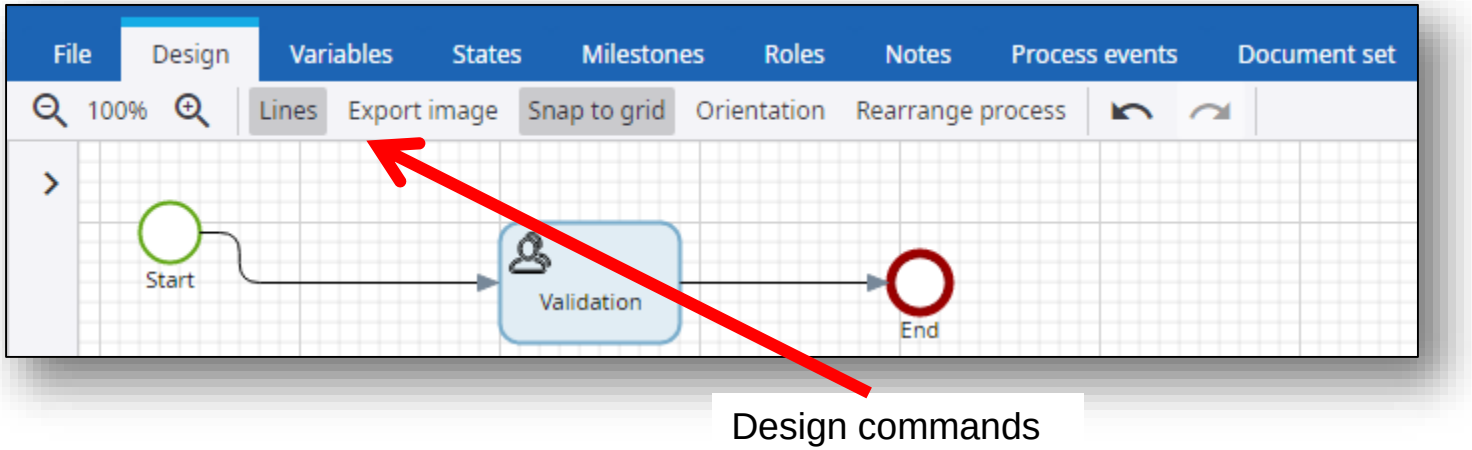
Design Commands

- Zoom in/zoom out
- Lines - Displays gridlines
- Export image - Creates a jpg of the process which is downloaded to the client
- Snap to grid - Snaps activities to the gridlines
- Orientation - Horizontal or vertical display of process
- Rearrange process - Auto alignment of process
- Undo/Redo



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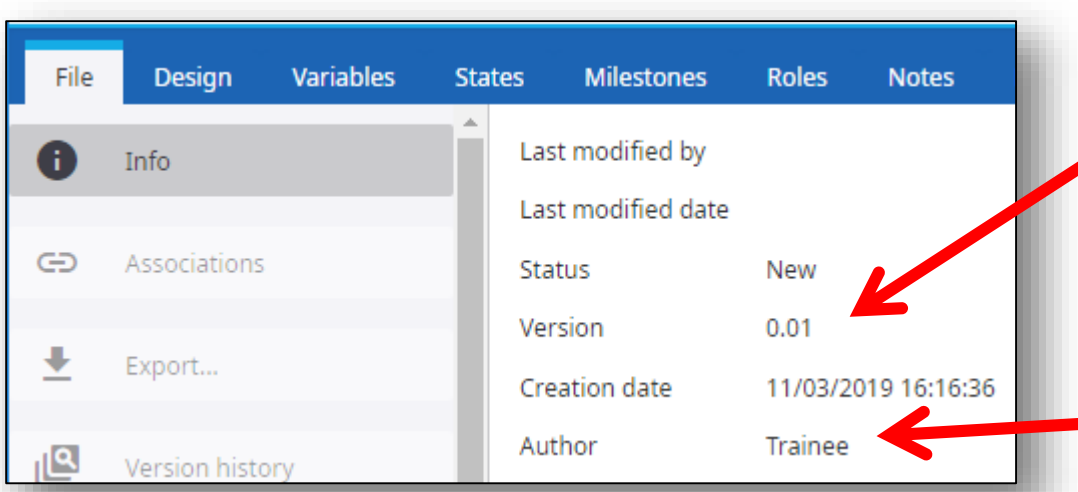
The File tab



Process version

Author

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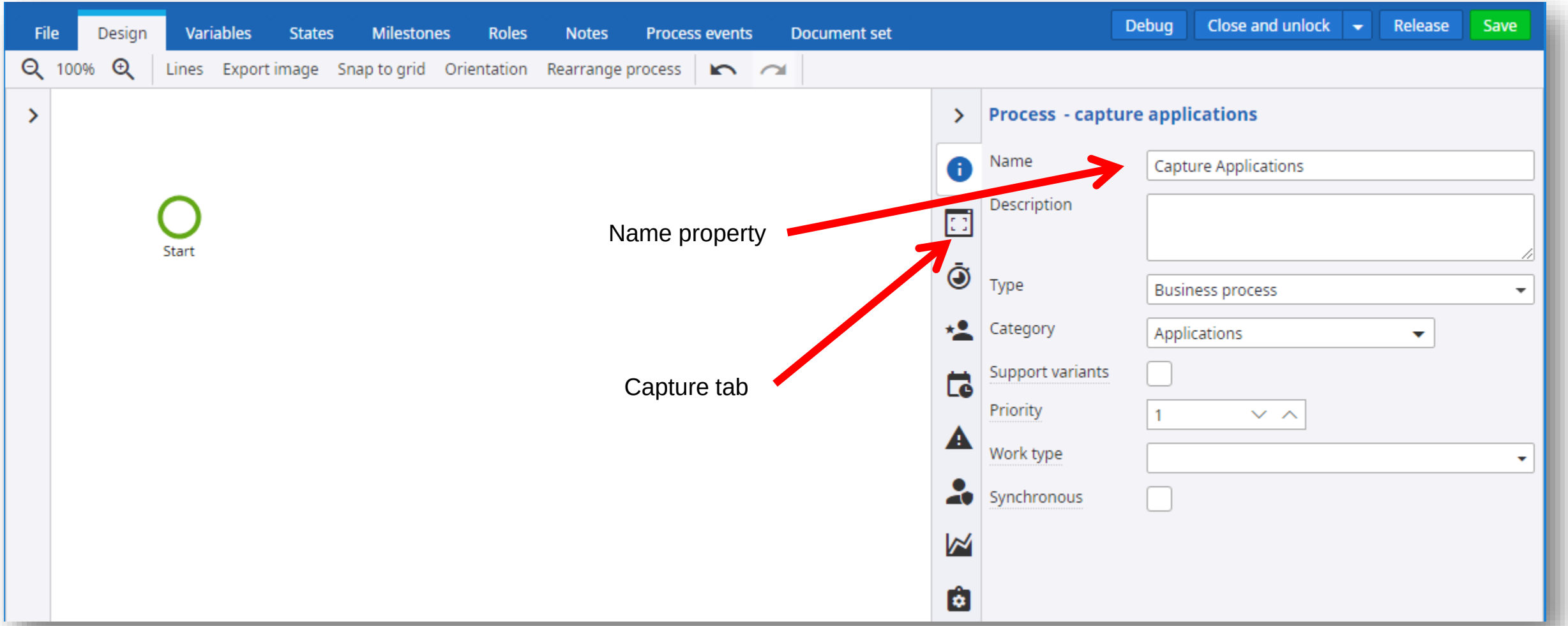
KOFAX

The Properties panel



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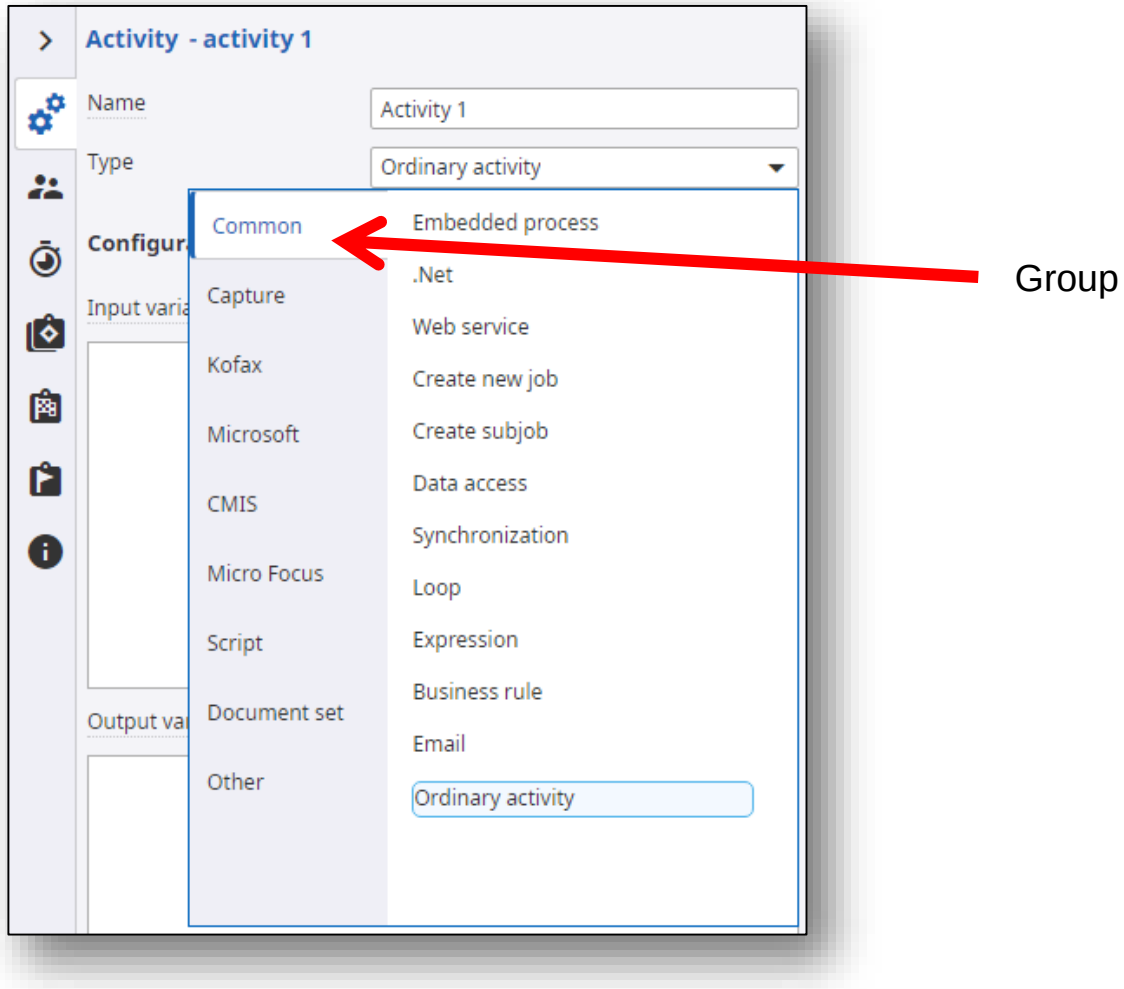
Groups



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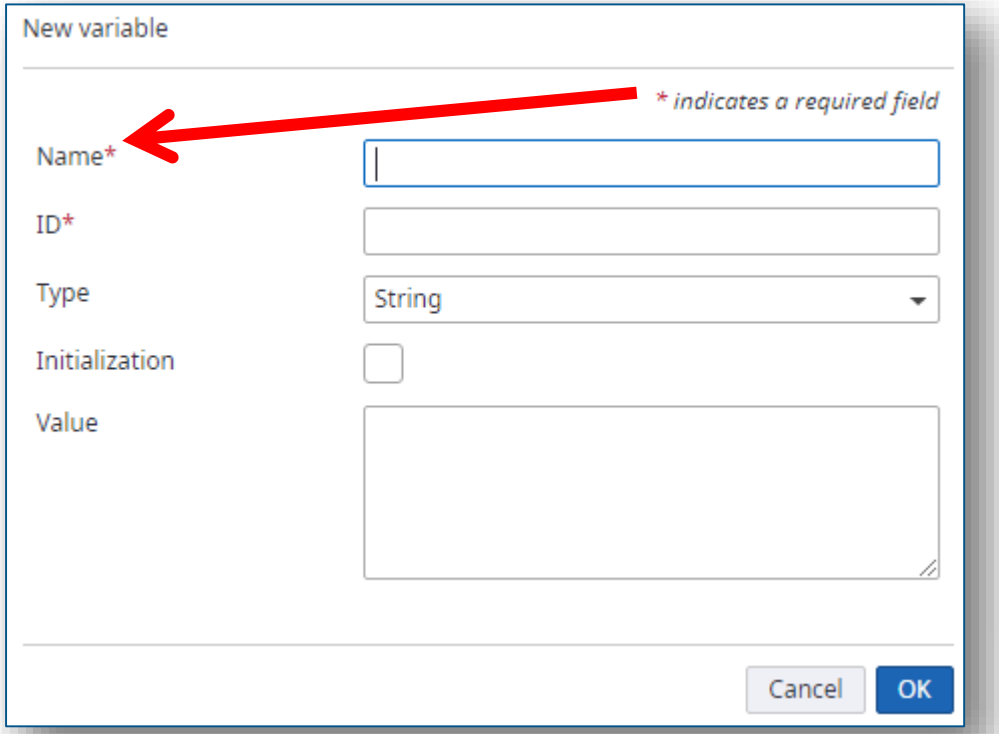
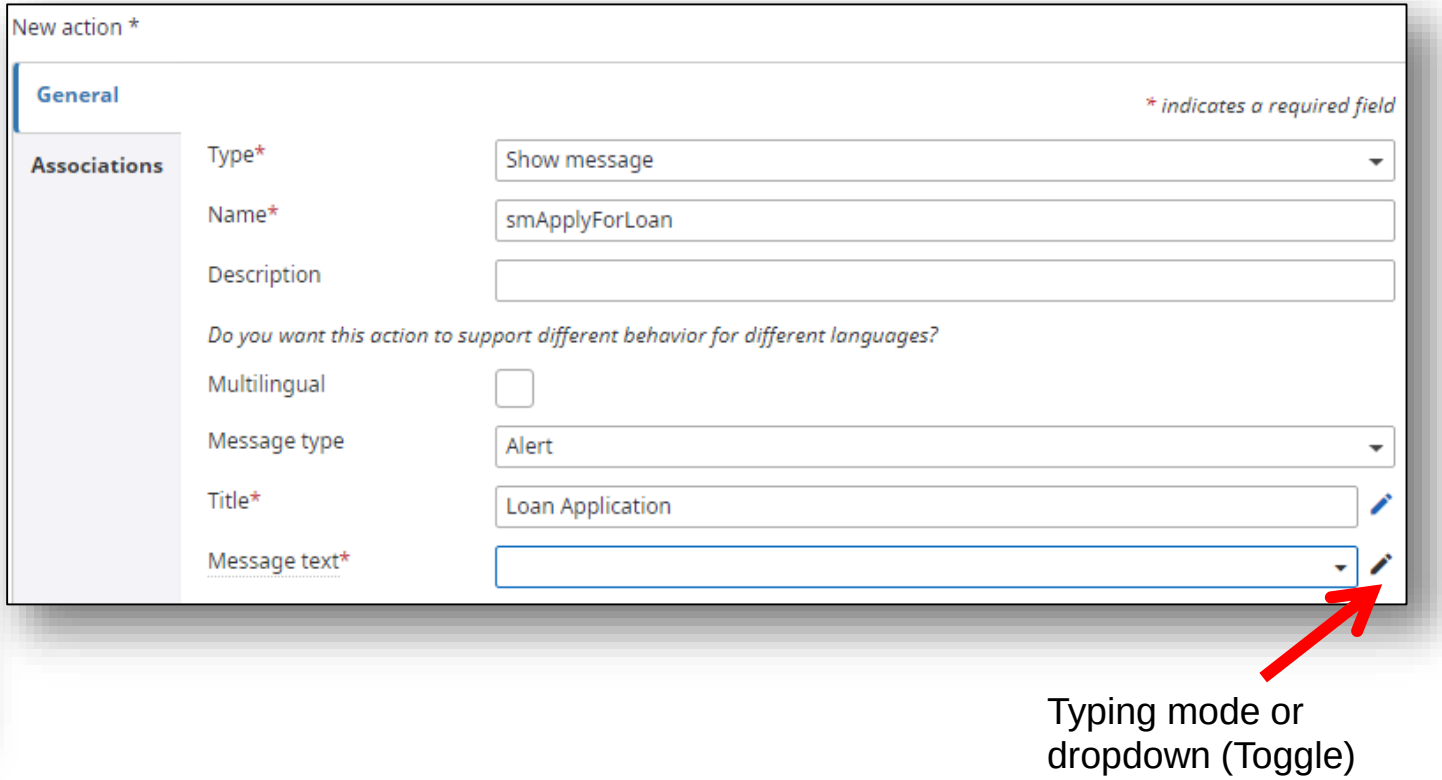
Dialogs

- If you create a new item, a dialog is displayed
- Mandatory fields have a red asterisk beside them





Typing mode or dropdown (Toggle)

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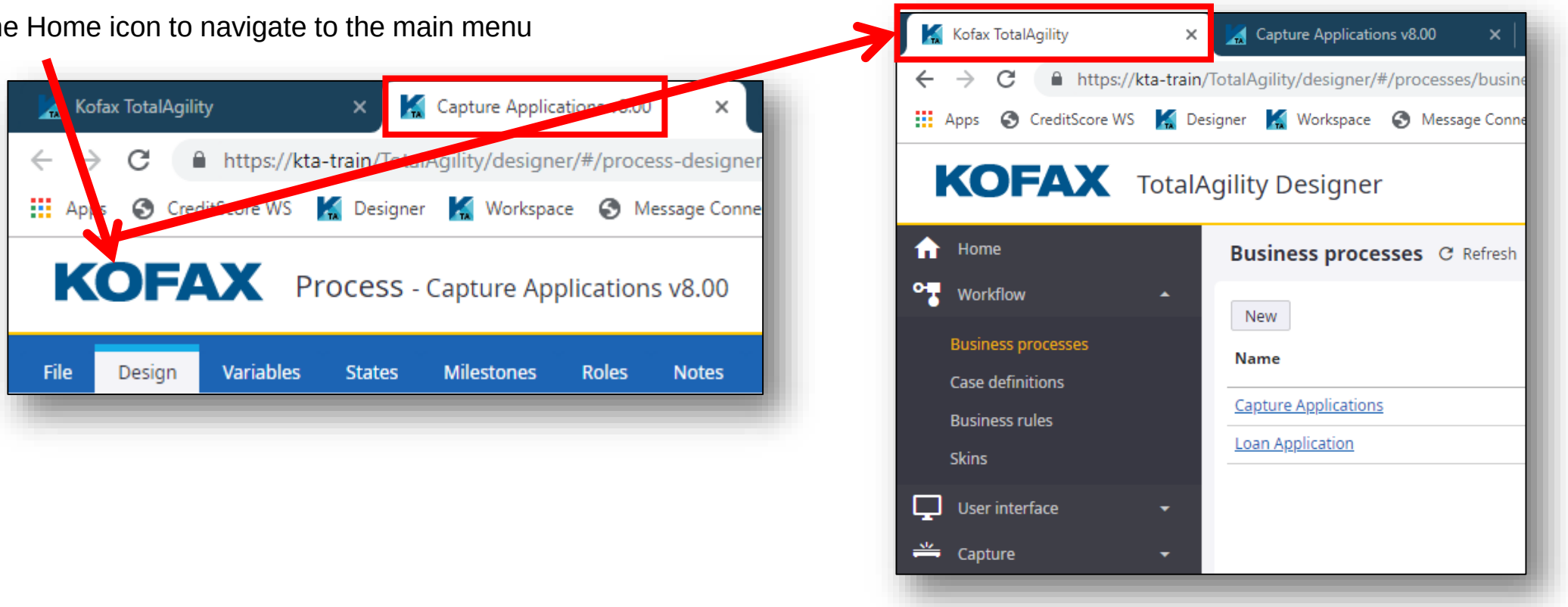
Navigating to the Home Page

- When e.g. the Process designer is open you can navigate back to the main menu using the **Home** icon

Click the Home icon to navigate to the main menu



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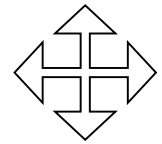
Select, Move, and Connect Activities

- Select an Activity

- Move an Activity
  - Select the activity
  - Hold left mouse button down and drag to new position



- Connect Activities
  - Select the activity
  - Hover mouse over the connector to get the hand cursor
  - Hold left mouse button down and drag to the of the activity you wish to connect to

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Process design basics

- Create a business process
- Set process name
- Add ordinary activities
- Connect activities
- Rearrange process
- Save/Release and Lock/Unlock
- Close process
- Categorize a process

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