In this lab you will learn how to customize forms (webpages) that are used in your site. You will add a dropdown list and web capture control to the loan approval form.

Lab 14-1

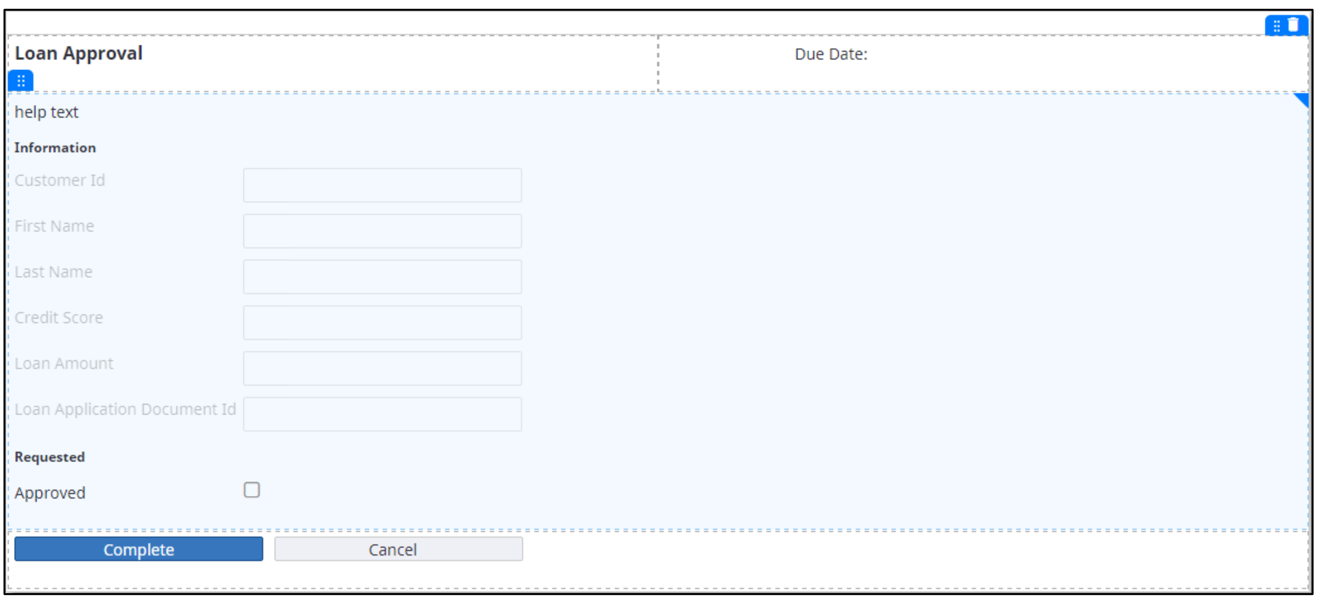
Customize Forms

In this lab, you will add a mandatory dropdown list to the loan approval form. The dropdown list will contain 2 options to either "Approve" or "Reject" the loan. You will also add an error message if the user does not provide a loan decision and display the error at the top of the form.

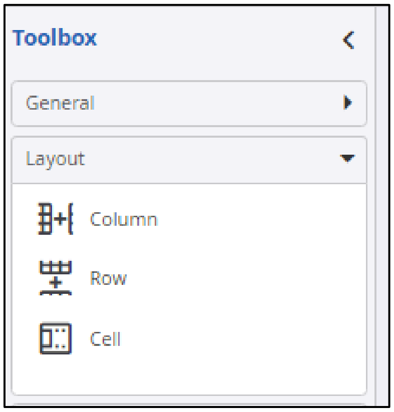
Move Controls and Add Rows/Columns

In this part, you will move controls, and add a row and column.

1. From the **Main** menu navigate to **User interface** > **Forms**.
2. Open the **LA_LoanApproval** form.
3. Move the fields into the order (drag and drop) as shown below:



4. Click into the last row (where the buttons are), and from the **Layout** Toolbox, click **Row**.



5. Drag and drop the **Loan Application Document Id** into the new row.
   Note: This field will be used by the Web Capture control to display the Application document.

6. From the **Layout** Toolbox, click **Column**.
   Note: A new column is added to the right of the existing column.

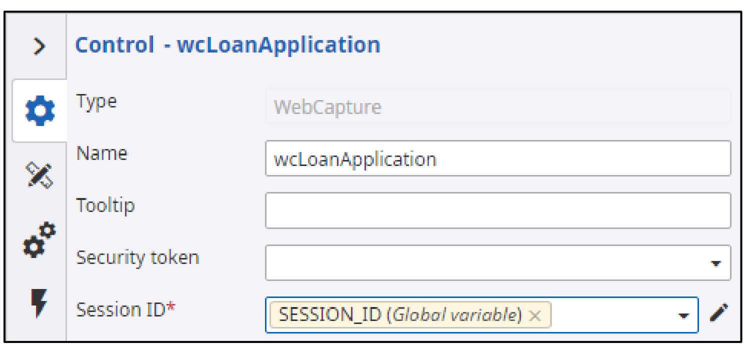
Add and Configure a Web Capture Control

The Web capture control will be used to display a loan application document from the TotalAgility_Documents database. You will also configure the control to only display certain toolbar buttons in its toolbar.

7. From the **Advanced** Toolbox, click **Web capture**.

8. From the **Properties** panel, set the **Name** property of the control to **wcLoanApplication**.

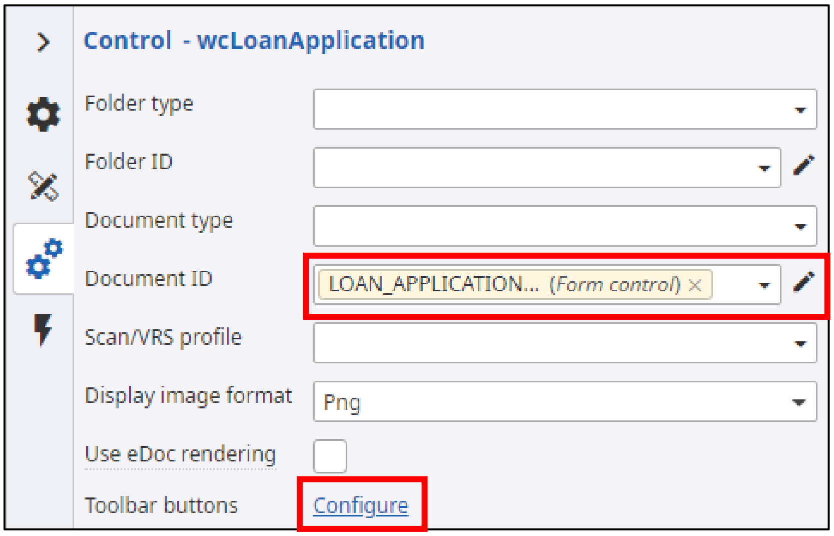
9. From the **Session ID** dropdown, select **SESSION_ID** (Global variable in the Default category).
   Note: TotalAgility ships with a number of out of box global variables that can be used by any form. The Session Id is a security measure to ensure that a user has a valid session (has logged in).



10. In the **Properties** panel, select the **Design** tab, and set the **Height** property of the control to **550** pixels.

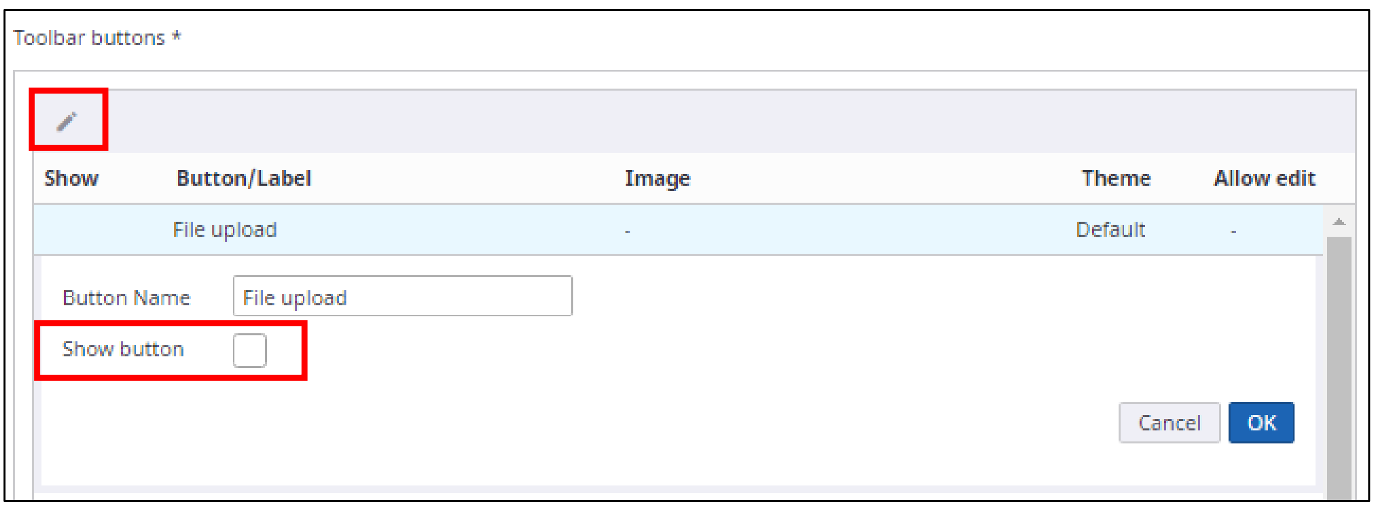
11. Select the **Configuration** tab.

12. From the **Document ID** dropdown, select **LOAN_APPLICATION_DOCUMENT_ID_input** (Form control).



13. Click the **Toolbar buttons Configure** hyperlink.

14. Select the **File upload** button in the table, click the **Edit** icon (pencil), and uncheck the **Show button** checkbox. Click **OK** to update.



15. Repeat this for the following toolbar buttons:
    Add page from file
    Scan
    Save
    Select scanner
    Add page from scanner.

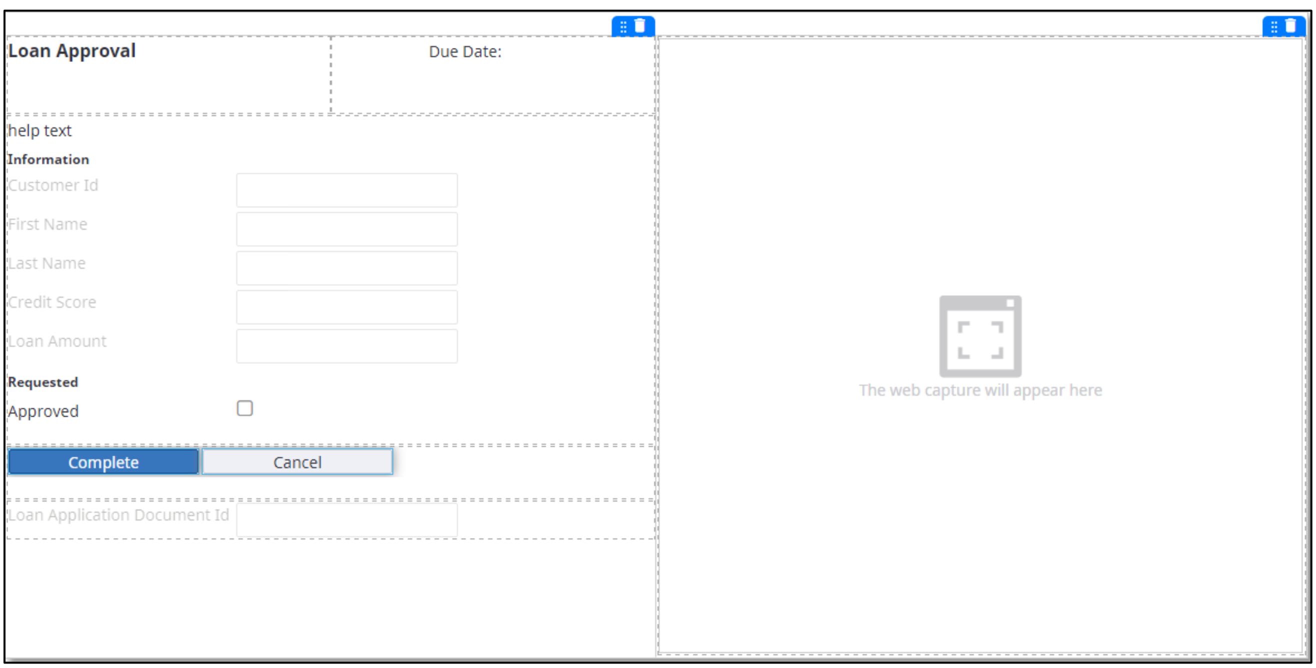
16. Click **Save**.

Show	Button/Label	Image	Theme	Allow edit
	File upload	-	Default	-
	Add page from file	-	Default	-
	Save	-	Default	-
	Select scanner	-	Default	-
	Scan	-	Default	-
	Add page from scanner	-	Default	-

Change Control Width

In this part, you will learn how to change all control widths, individual control widths, and the associated label width (for new controls).

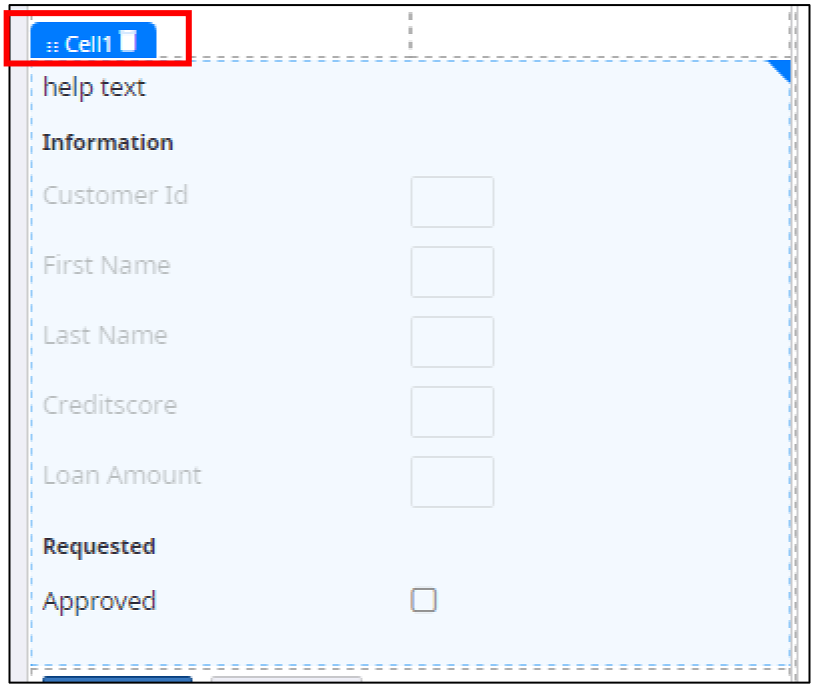
17. Click outside the borders of the form to display the **Form** properties panel.
18. Select the **Settings** tab, and set **Control width (%)** to **70**, and click **Update**.
19. Set **Associated label width** to **200** pixels.
20. Select the **Complete** button and the **Cancel** button using the **CTRL** key.
21. From the shared **Properties** panel, set **Width mode** to **Percentage** and **Percentage width (%)** to **30**.
22. The form should look like this:



Add and Configure Dropdown List Control

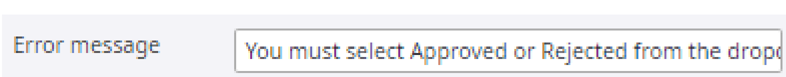
In this part, you will add a new dropdown list control to the form. The dropdown will be a mandatory field that will replace the Approved checkbox with a choice of approval options.

23. Select **Cell1** (the cell that contains the textboxes).

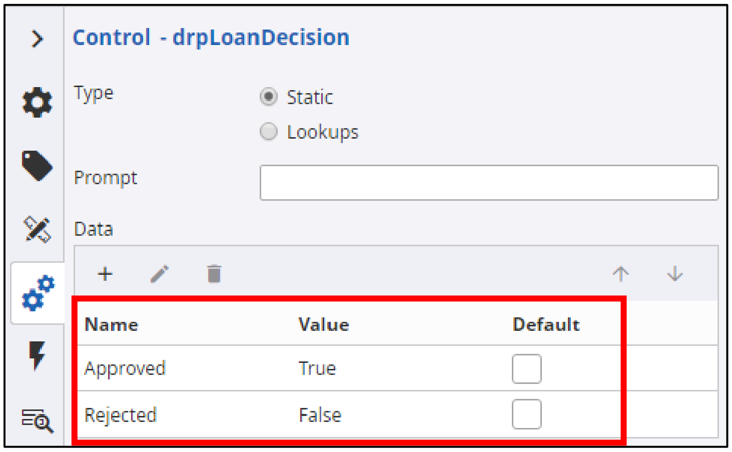


24. From the **General** Toolbox, click **Dropdown list**.
25. Enter **Loan Decision** as the **Label** text.
Note: You can also set the text by clicking the **Label** tab in the **Properties** panel.
26. From the **Properties** panel, set the **Name** property to **drpLoanDecision**.
27. From the **State** dropdown, select **Mandatory**.
28. Enter the following text in the **Error message** property:

```
You must select Approved or Rejected from the dropdown.
```

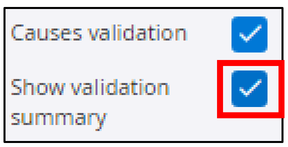


29. Select the **Configuration** tab and in the **Data** area, enter the following **Static** Items.

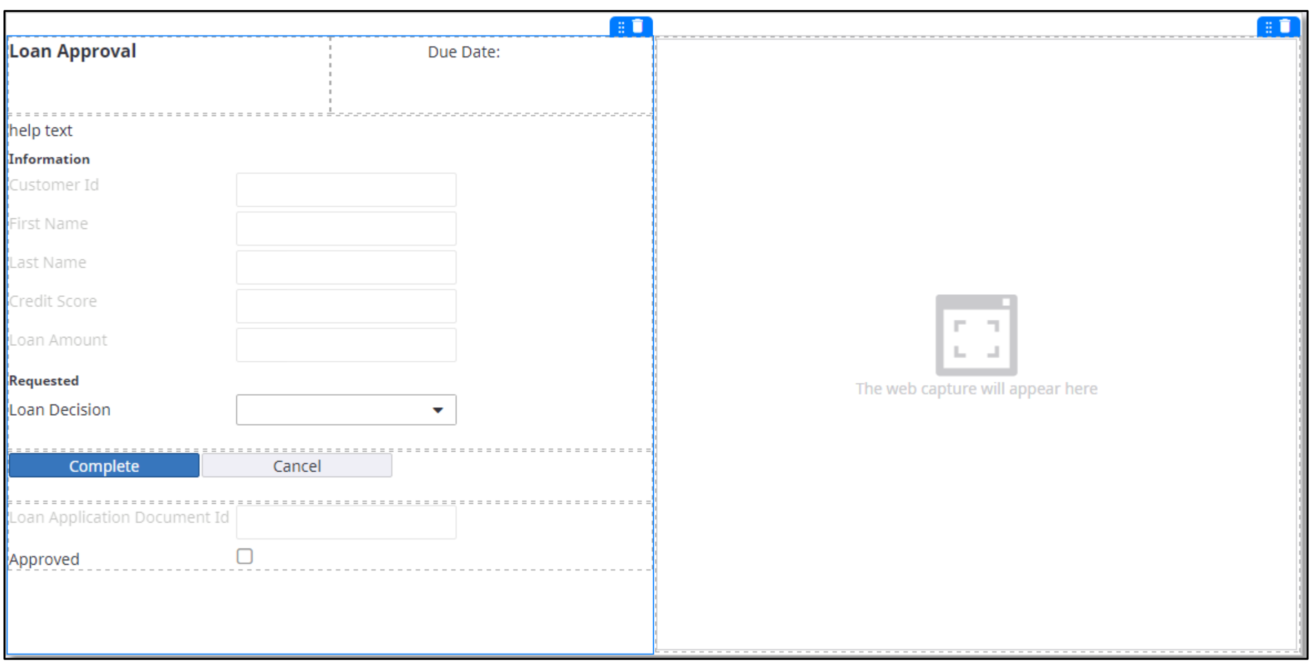


Note: Do not select a Default for the drop down. If you have, click **Reset defaults** hyperlink.

30. Select the **Complete** button, and check the **Show validation summary** checkbox.

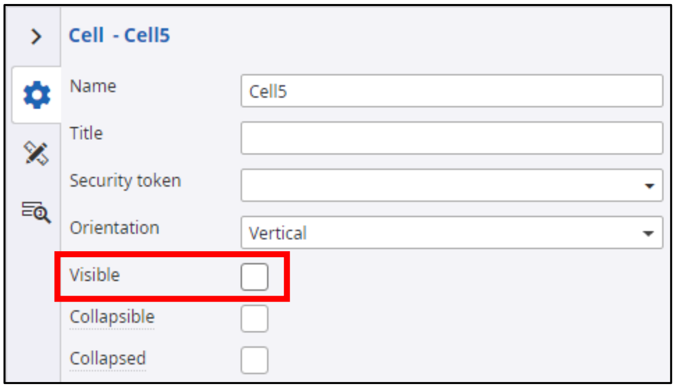


31. Drag and drop the **Approved** checkbox into the last row below the Loan Application Document Id textbox. The form should look like this:



32. Click into the last row (**Cell5**) of the form (1st column).

33. From the **Properties** panel, uncheck the **Visible** property.



Edit Form Actions

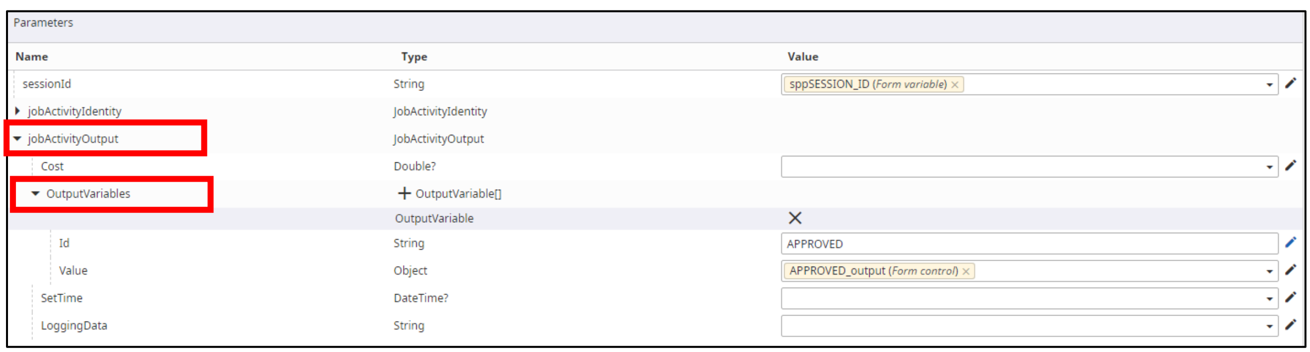
In this part, you will modify an existing form action. When the form was originally built, a number of actions were added to the form. The activitycomplete action changes the status of an activity to complete and updates any output variables that are associated with the activity. In this example, Loan Decision output variable is taking its value from the original checkbox that was created when the form was generated. In this part you will remap the action to point at the new drop down list control that you added to the form.

34. From the **Ribbon**, select the **Actions** tab.

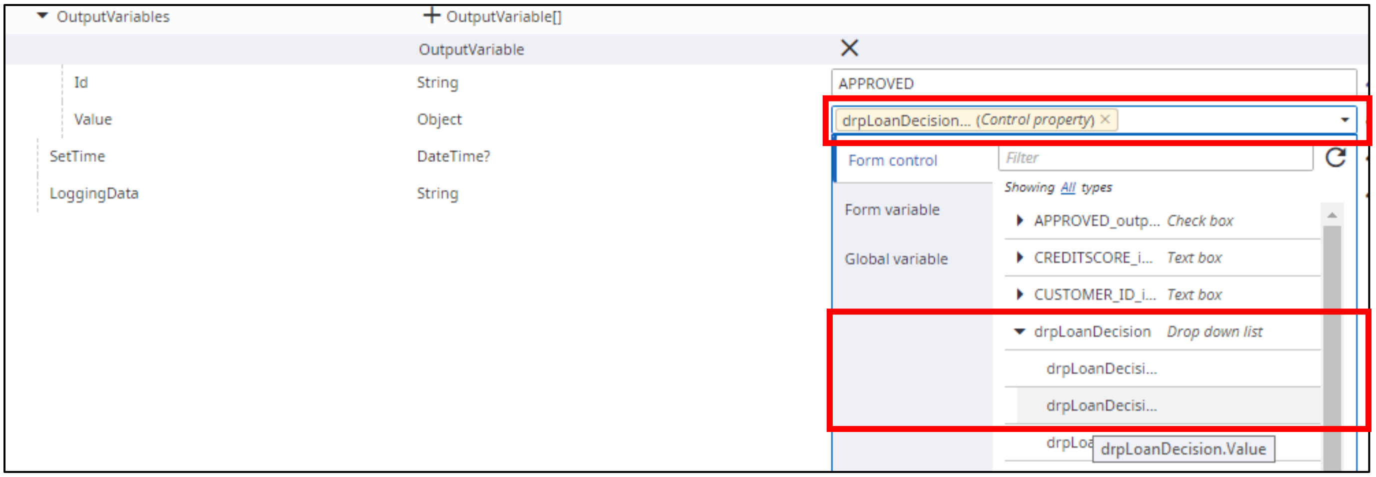
35. Select the **activitycomplete** action from the list of actions.

36. Click the **Configure** hyperlink.

37. Expand the **jobActivityOutput** field and expand **OutputVariables**.



38. From the **Value** dropdown, select **drpLoanDecision.Value**.



39. Click **OK** and click **Update**.

40. From the **Ribbon**, select the **Design** tab.

41. **Release** and **Close and unlock** the form.

Update Process Help Text

In this part you will modify the Loan Approval activities Help text to reflect the use of a dropdown list rather than a checkbox.

42. From the **Main** menu navigate to **Workflow** > **Case definitions**.

43. Open the **Loan Application** case definition.

44. Select the **Loan Approval** activity and modify the **Help text** property to reflect the new dropdown as follows:

```
Please ensure you select Approved or Rejected from the Loan Decision dropdown.
```

45. **Release** and **close and unlock** the process.

Important Note:

You will not be able to test the Web capture control until the next lab. At this stage in the training the Capture process and downstream Loan Application process are not connected to each other. In the next lab you will connect the capture process to the loan application process and test the web capture control.

Lab 14-2

Test Form Customization

In this part you will test the Loan Approval form by creating a job.

Create Job

1. Log into the **xyzbank** site as **jpike**.
2. Select **Loan Applications > New**.
3. Enter **RD001** as the **Case Reference** (you may wish to run Job clear down) and click **Create Case**.
4. Log into the **xyzbank** as **ssmyth**.
5. Take the **Loan Approval** activity.
6. Click the **Complete** button. Notice that you cannot complete the activity until an approval decision has been selected in the dropdown.
7. Select **Approved** in the dropdown list and click **Complete**.
   Note: The decision activity tests the value of the Approval Decision variable and the Generate Confirmation Letter path is executed. The Post Forms activity should be pending on jpike's work queue.

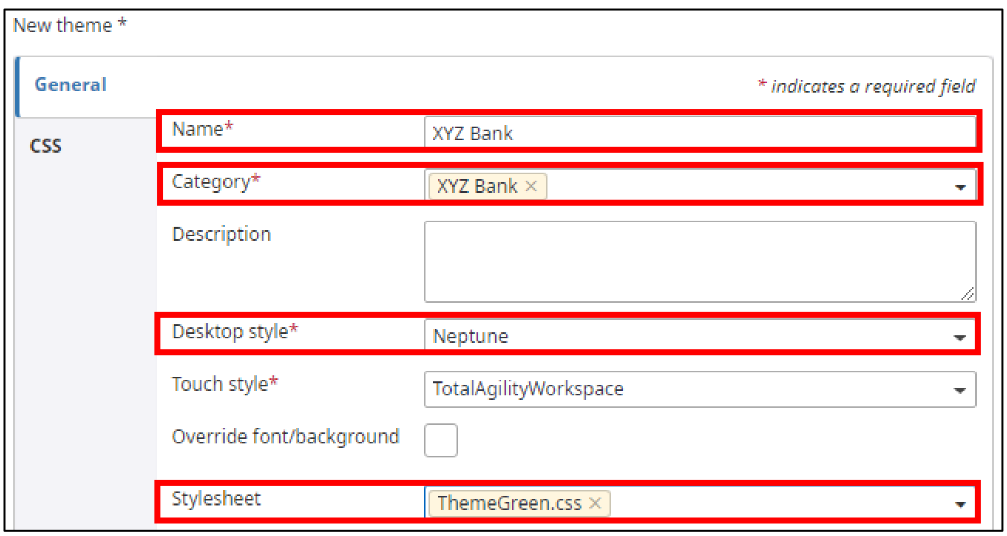
Lab 14-3

Creating a Theme

Create a Theme

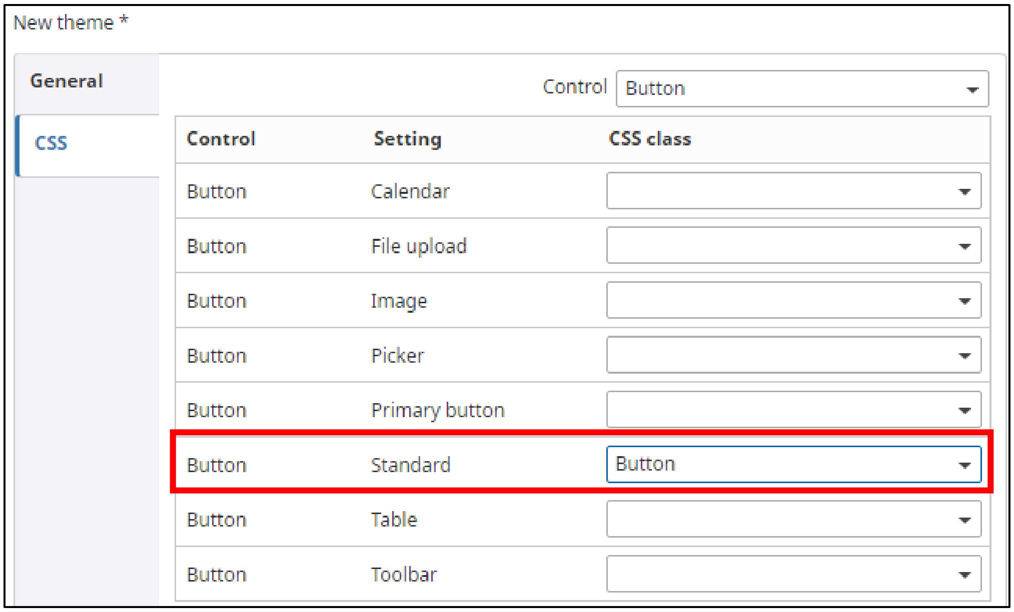
In this part, you will create a new theme and apply it to the xyzbank site. A theme controls the default font and font sizes, the style of tabs, tables, buttons and calendars.
Note: You can use your own Style sheet to control the theme.

1. From the **Main** menu navigate to **User interface > Themes**, and click **New**.
2. Set the **Name** and **Category** to be **XYZ Bank**.
3. From the **Desktop Style** dropdown, select **Neptune**.
4. From the **Stylesheet** dropdown, select **ThemeGreen.css** (TotalAgility Forms Category).
   Note: CSS files must be located in the following folder location if not using the TotalAgility Store:
   C:\Program Files\Kofax\TotalAgility\Agility.Server.Web\Forms\StyleSheets.



5. Select the **CSS** link.
6. From the **Control** dropdown (top right), select **Button**.

7. From the **Standard** dropdown, select **Button**.

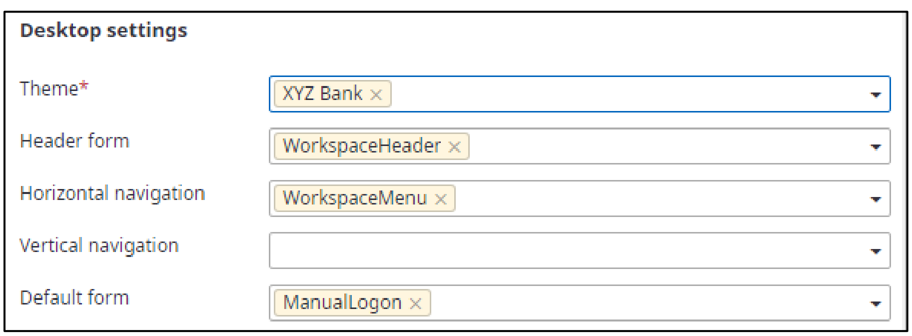


8. Notice that you can assign styles in the stylesheet to basic controls, tables, tabs, menus etc. **Note:** You will not map the styles in the stylesheet to all the controls.

9. Click **Save**.

10. From the **Main** menu navigate to **User interface > Sites**, and click **xyzbank** (XYZ Bank category).

11. From the **Theme** dropdown, select **XYZ Bank** (XYZ Bank category).



12. Click **Save**.

13. Open a new tab in the browser and click the shortcut to the **xyzbank** website. The login button should appear in green. **Login** as **jpike** and notice the new theme (Neptune).

14. Since we have only specified a **Button** control in the **XYZ Bank** theme, set the site theme back to the **TotalAgility Workspace** theme (TotalAgility Forms category) using steps 10-12.

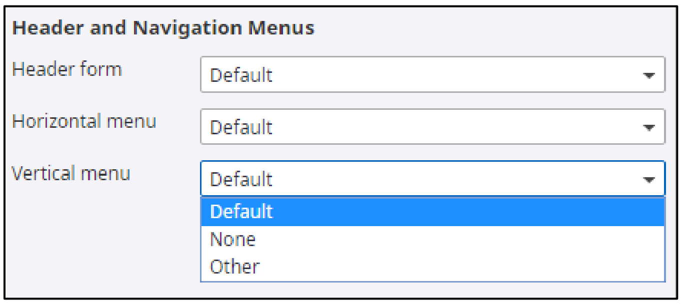
Apply a Menu to a Form

In this part, you will learn how to apply navigation to a form.

15. From the **Main** menu navigate to **User interface** > **Forms**.

16. Open the **LA_LoanApproval** form.

17. From the **Properties** panel, locate the **Horizontal menu** property. Note that you can either set Navigation to **Default** (which will pick up the Default Menu assigned to the site), **Other** (consume a menu), or have **None**.



18. From the **Vertical menu** dropdown, select **None**.
Note: You can also have a separate **Header form** for each form.

19. **Release** and **Close and unlock** the form.

In this lab you will learn how to format your forms (webpages) in your site. You will add a header graphic, modify the appearance of the logon form, and learn how you can define a theme to control the overall look of the site.

Lab 14-4 – Self Learning (Do not complete in class)

Formatting Forms

You can reference an image in a Kofax TotalAgility form using either of the following options:

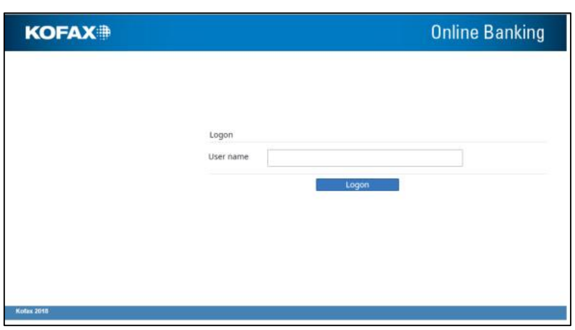
(i) Save the image to the default images folder which is located at:
C:\Program Files\Kofax\TotalAgility\Agility.Server.Web\Forms\Images\
Then in the form, you just need to reference the image name and extension i.e. KTA.png.
(ii) Provide a full http:// path to the image.
(iii) TotalAgility Image Store

Add Images to the Store

1. From the **Main** menu navigate to **User interface > Images**, and click **New**.
2. Click **Browse…** and navigate to: C:\KTAEssentials\LabFiles\Images
3. Select the **OnlineBankingHeader2.jpg** and click **Open**.
4. Click **Save** and **Finish**.
5. Click the ⁝ and from the **Context** menu, and select **Preview**.
6. **Close** the Preview.

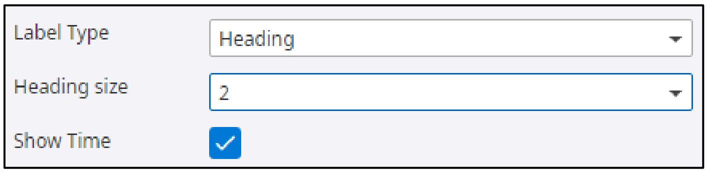
Format the Logon Screen

In this part, you will change the appearance of the manual Logon form.
The final form will look like this:



7. From the **Main** menu navigate to **User interface** > **Forms**.
8. Open the **ManualLogon** form (XYZ Bank category).

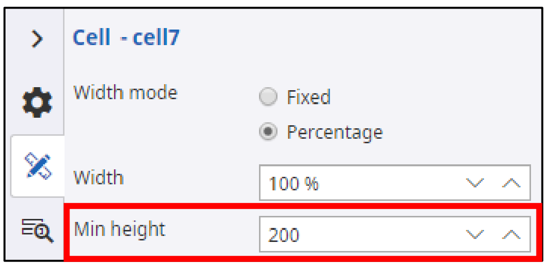
9. Select the **Logon** label, and in the **Properties** panel, from the **Label Type** dropdown, select **Heading**, and from the **Heading Size** dropdown, select **2**.



10. Click into the **last** row, and from the **Layout** Toolbox, click **Row** twice.

11. Click into the **2nd last** row.

12. In the **Properties** panel, select the **Design** tab, and set the **Min height** property of the row to **200** pixels.



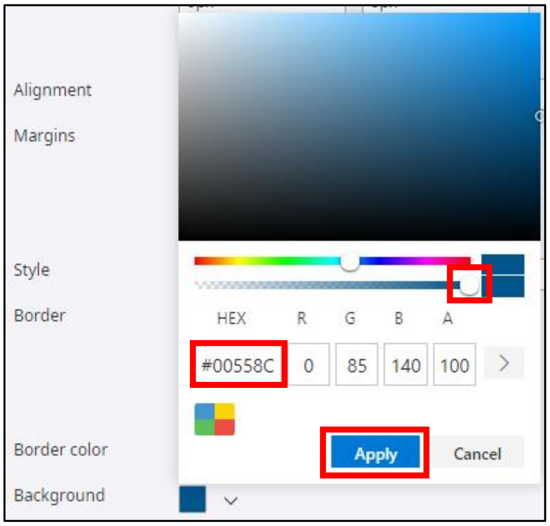
13. Click into the last row.

14. From the **General** Toolbox, click **Label**, and set the following properties:
Name = lblKofax (General tab)
Text = Kofax [Type the current year] e.g. Kofax 2019 (General tab)
Margin = 20 (left), 0, 0, 0 (Design tab)
Style = Inline, White text, Bold (Design tab)

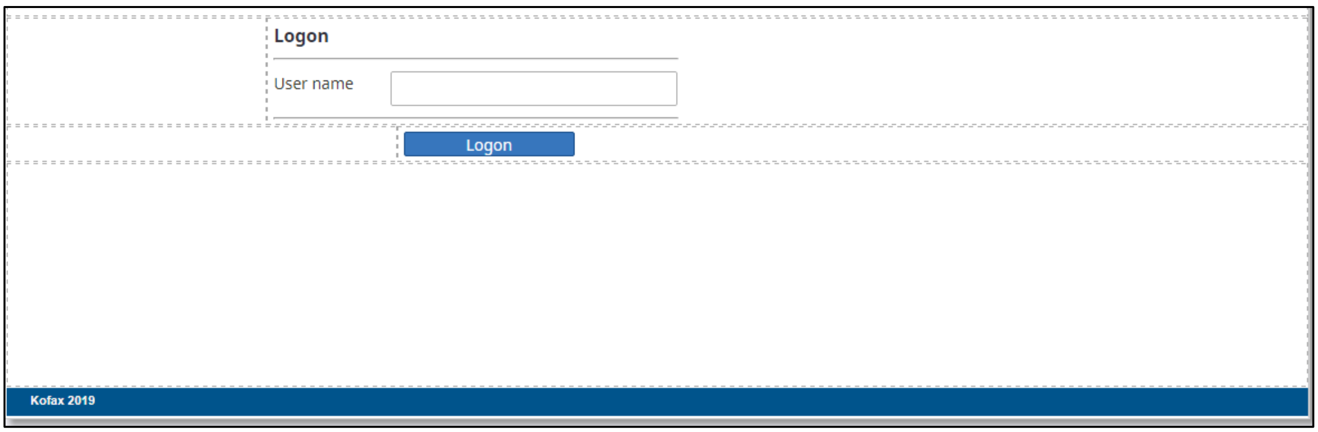
15. Click into the last row.

16. In the **Properties** panel, select the **Design** tab and from the **Style** dropdown, select **Inline**.

17. From the **Background** dropdown, enter **#00558C** as the **HEX** code and drag the **Transparency** slider to the top (not transparent, A=100).

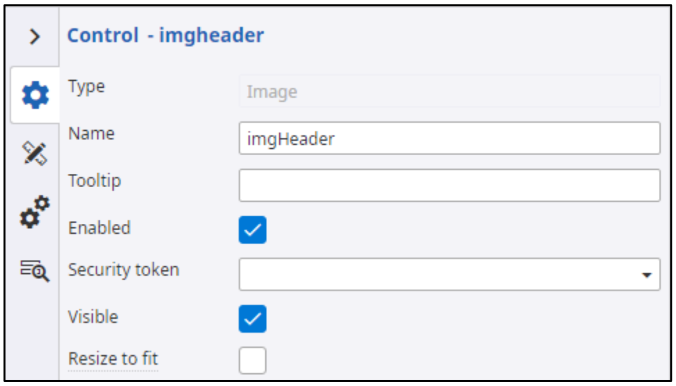


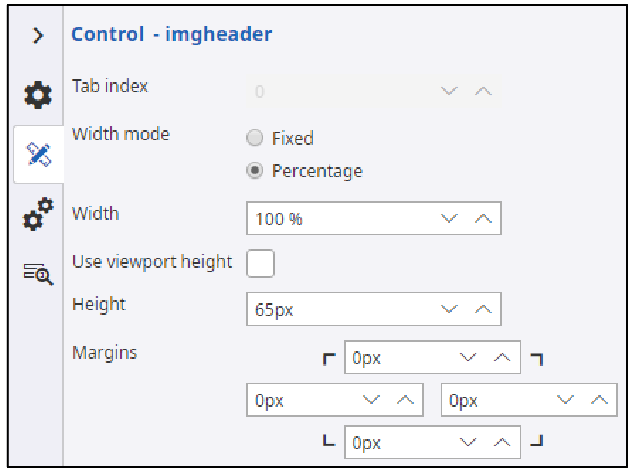
18. Click the **Apply** button.



19. Click into the 1st row (Cell2).

20. From the **General** Toolbox, click **Image** and set the following properties:
Name = imgHeader (General tab)
Resize to fit = Uncheck (General tab)
Width mode = Percentage (Design tab)
Width = 100% (Design tab)
Height = 65 pixels (Design tab)
Margin = 0, 0, 0, 0 (Design tab)

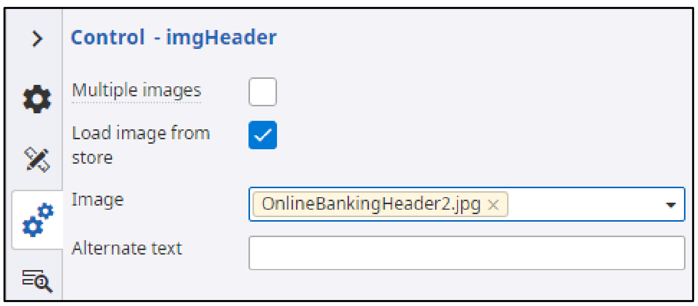




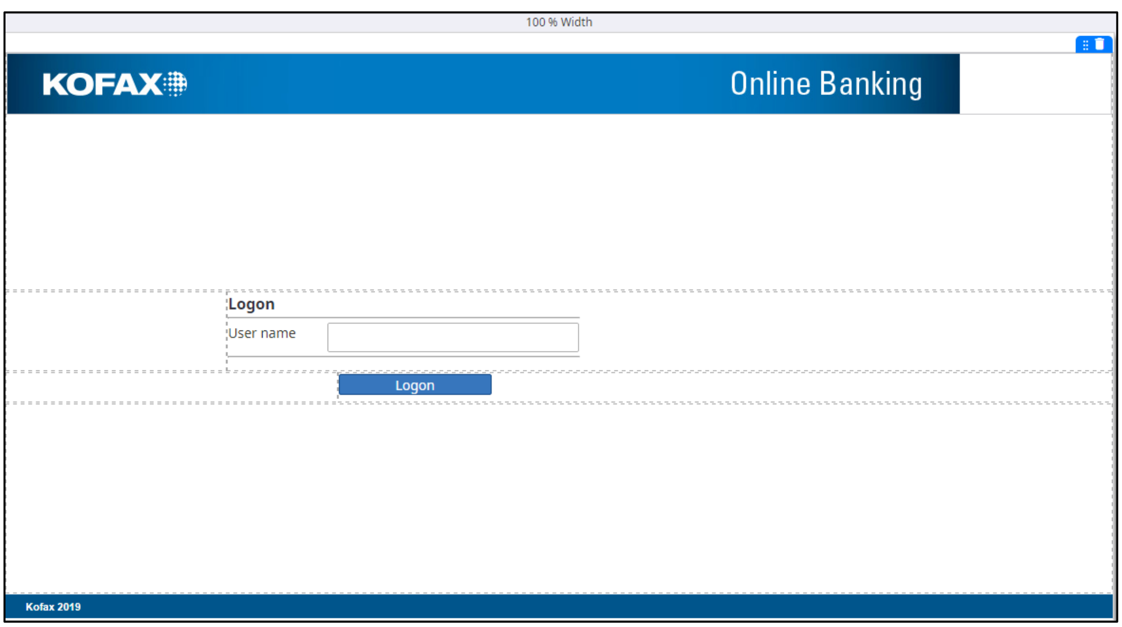
21. Select the **Configuration** tab.

22. Check **Load image from store**.

23. From the **Image** dropdown, select **OnlineBankingHeader2.jpg**.



24. The form should look like this:



25. **Release** the form.

26. Note that forms are **WYSIWYG**. What you see on screen is what will appear in a browser.

27. **Close and unlock** the form.

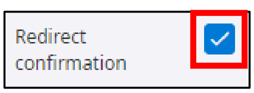
Lab 14-5 - Self Learning (Do not complete in class)

Controlling User Redirect Behavior

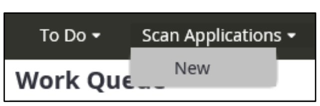
Examine Redirect Options

In this part, you will open the document review form and modify the forms Redirect Confirmation property. You will configure a warning message to be displayed if a user attempts to navigate away from a form. This can be especially useful on Activity forms.
Examples include:
(i) Any action that takes the user away from the current form (e.g. redirect action, menu).
(ii) Closing the browser tab/window.
(iii) Typing into the integrated browser search bar.
(iv) Typing a URL into the browser address bar.
(v) Using the browsers Back/Forward buttons.

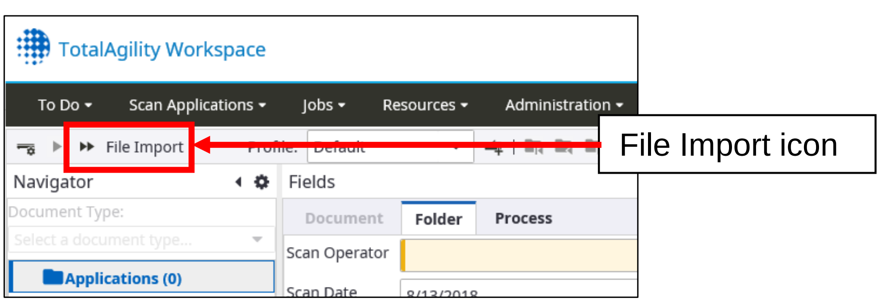
1. From the **Main** menu navigate to **User interface** > **Forms** and open the **Capture Applications_Document Review** form.
2. In the **Properties** panel, select the **Settings** tab.
3. By default, **Redirect confirmation** is checked.



4. **Close and unclock** the form (do not save changes if prompted).
5. Open a new tab in the Browser and click the **xyzbank** shortcut in your toolbar.
6. Logon as **pblack**.
7. Select **Scan Applications** > **New**.



8. The **Capture Applications Scan** page is loaded.
9. Select the **File Import** Icon.

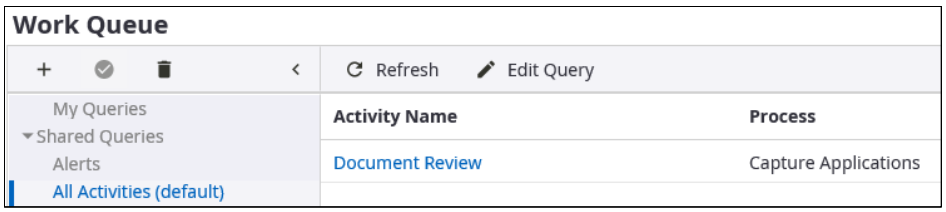


10. **Browse** to C:\KTAEssentials\LabFiles\Documents\Test Set and select the first document and click **Open.** The file will be imported.

11. Click the **Create Job** icon.

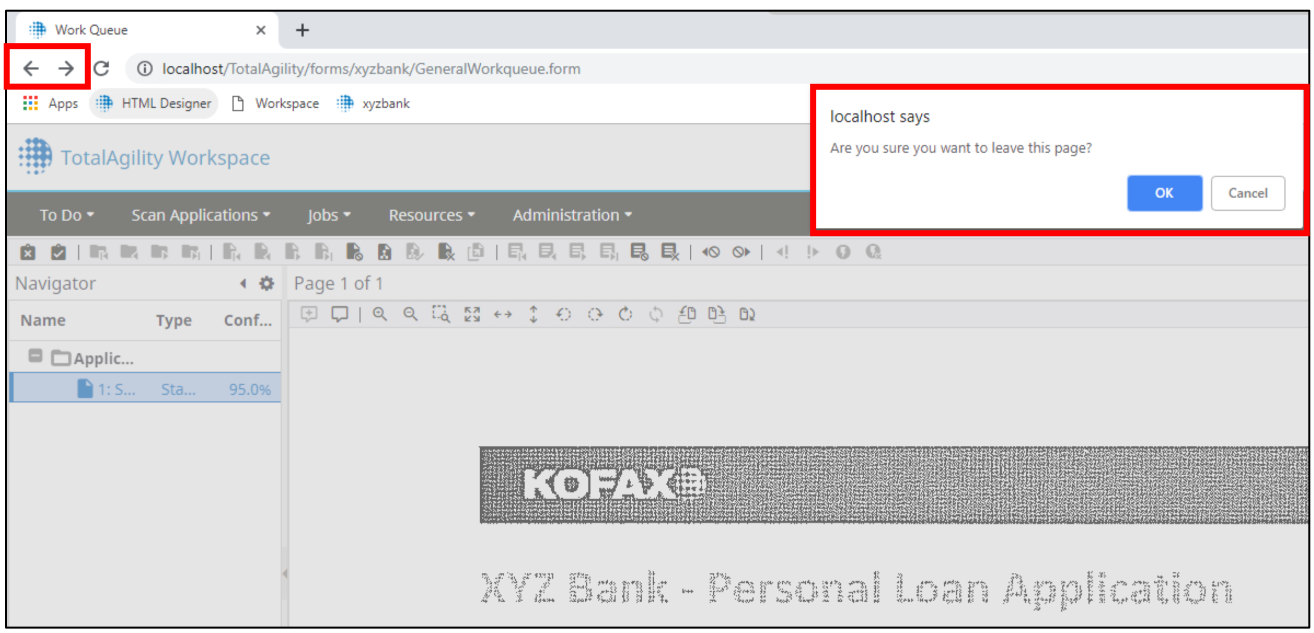
12. Select **To Do > Work Queue**.

13. Take the activity called **Document Review** by clicking the activity name.



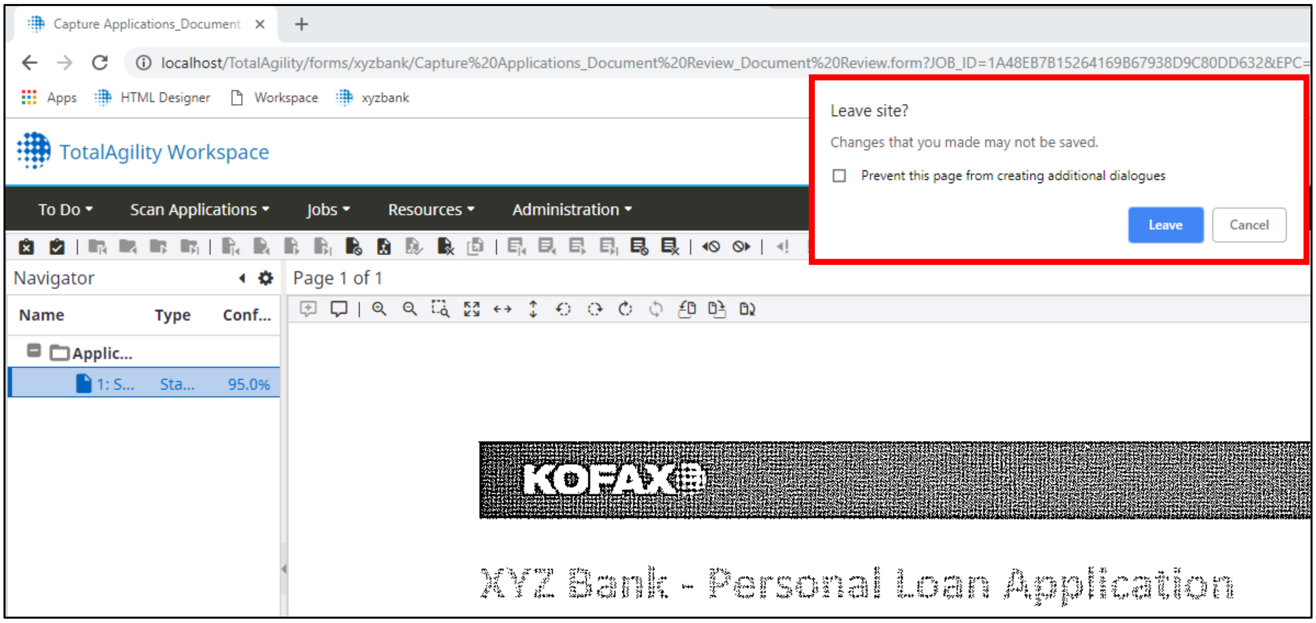
14. Click **No** when asked to if you want to complete the activity.

15. Click the **Back** or **Forward** button in the browser (a warning message is displayed).



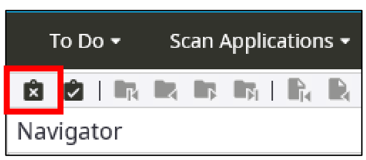
16. Click **Cancel** to stay on this page.

17. Try closing the broswer tab.



18. Click **Cancel**.

19. Click the **Cancel Activity** button in the capture toolbar.



20. Click **Yes**.

Revision Questions

1. The Web capture control can be added to a form and can be configured to display which file types?

   ____

   ____

2. Which permission is required to view a document that is displayed in a Web capture control?

   ____

3. How can you update the widths of all controls on a form without manually changing the width of each one individually?

   ____

4. You need to update the width of all the labels that are associated with textbox controls on a form without manually updating each label individually. How would you achieve this?

   ____

5. Which action would you modify if you wished to map an output variable to a dropdown list rather than a checkbox?

   ____

6. When is a controls error message displayed?

   ____

7. What happens when a user clicks a button that has its Show Validation Summary property set to Yes?

   ____

8. A designer has created a new theme with a cascading stylesheet. What additional steps are required in order for a site to use the new theme?

   ____

9. What feature can be configured on a form to prompt the user that they have tried to navigate away from the form?

   ____

10. Can you turn off vertical and horizontal navigation for an individual form?

    ____

11. Can you turn off the header form for an individual form?

    ____

12. Is it possible to create a unique navigation bar for a specific form?

    ____

13. Is it possible to change the background color for an individual textbox on a form?

    ____