

TECHNICAL TRAINING LAB INSTRUCTIONS

In this lab you will learn how to login to the TotalAgility Designer and navigate around it. You will also learn how to create a simple capture workflow business process, save, release, lock, unlock a process, and how to categorize the process.

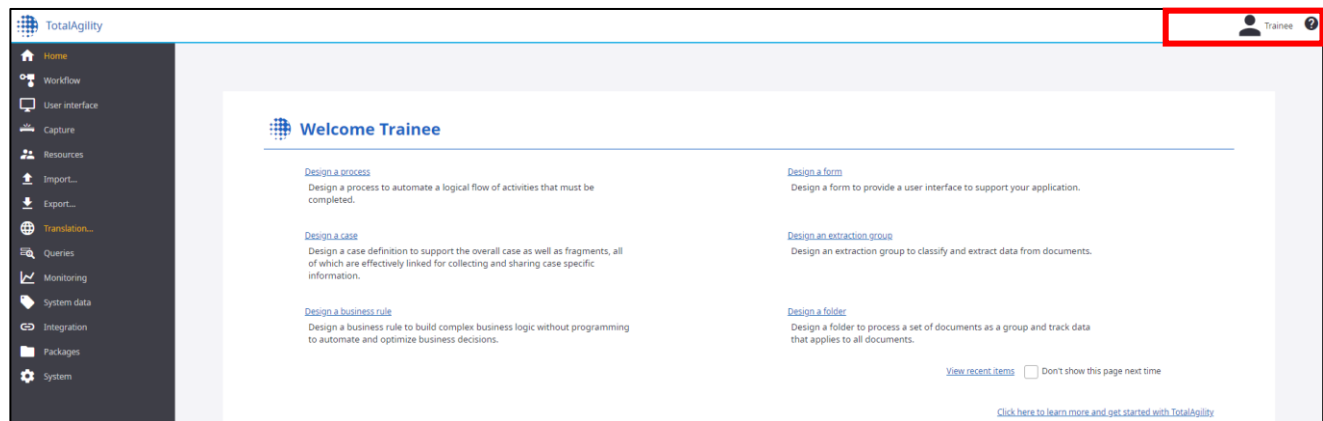
Lab 03-1

Login to the Designer

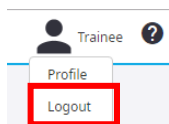
Training Image

The following URL's are used if you are attending TotalAgility classroom or live online training.

1. Open **Google Chrome**.
2. To access the Designer enter <http://kta-train/TotalAgility/Designer> or use the shortcut in **Start > Kofax TotalAgility > Designer**.
3. To access the TotalAgility Workspace enter <http://kta-train/TotalAgility/Forms> or use the shortcut in **Start > Kofax TotalAgility > Workspace**.
Note: Please examine the notes section at the end of this lab if you are logging into TotalAgility through Azure or On Premise.
4. The **Designer Home** page is displayed:



5. Your logon details are displayed at the top right corner of the Designer.
6. You can logout using the **Logout** command, click your username to access the submenu.



IMPORTANT NOTE:

To save time you should create a shortcut to the Designer and Workspace in your browser using the Bookmarks toolbar.

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In this lab you will learn how to design and create a new Business process. You will design the process using the Workflow menu.

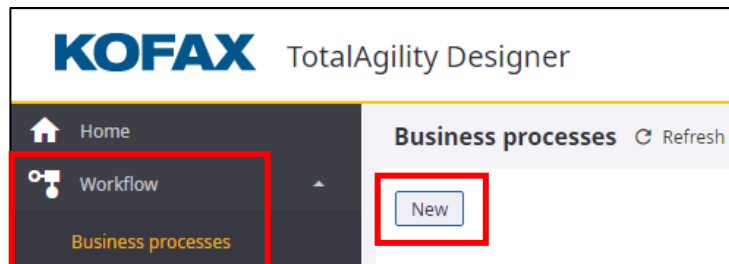
Lab 03-2

Create a Capture Workflow Business Process

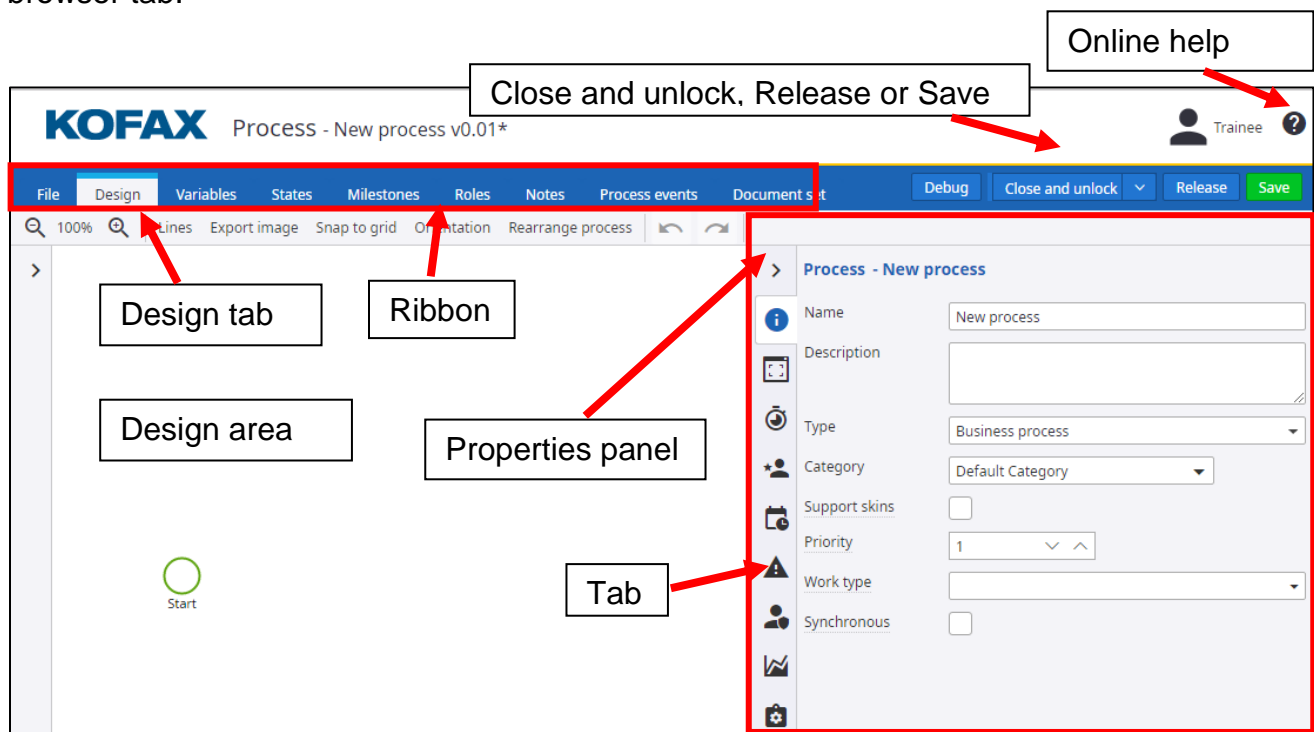
Create a Business Process

In this part, you will create a simple process that will be used to capture loan application forms. In later labs you will configure the process to perform classification, document review, extraction, and validation.

1. From the **Main** menu navigate to **Workflow > Business processes**, and click **New**.



2. A new **Business process** is created, and the **Process designer** is displayed in a new browser tab.



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- From the **Properties** panel, set the **Name** property to **Capture Applications**.


The screenshot shows a dialog box titled 'Process - New process'. It has two main sections: 'Name' and 'Description'. The 'Name' field contains the text 'Capture Applications'. The 'Description' field is empty. There are icons for 'Name' (an information icon) and 'Description' (a document icon) on the left side of the dialog.

Add Ordinary Activities

In this part, you will add ordinary activities to the Capture Applications process.

- Select the **Start** activity to display the **Satellite** activities.



- With the mouse positioned over the Activity , click to add **Activity 1**.
- Enter **Classification** for the activity name.
- Draw the process illustrated in the image below:

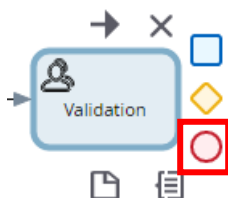


- Notes:**
- (i) The 2nd activity is called Document Review.
 - (ii) You can double-click on the activity to enter/edit the activity Name.
 - (iii) Press the **Tab** key or click away, to leave the activity when you finished typing.

Add an End Point

In this part, you will add an end point.

- Select the **Validation** activity, and from the **Satellite** activities, click **End point**.



Note: The completed process should look like this:

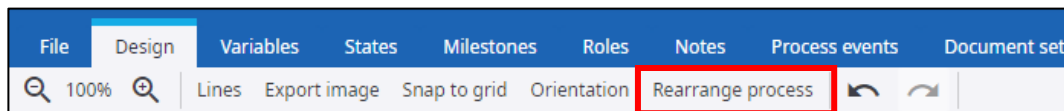
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Rearrange Process

In this part, you will learn how to automatically arrange the process.

9. From the **Design** tab, click **Rearrange process**.

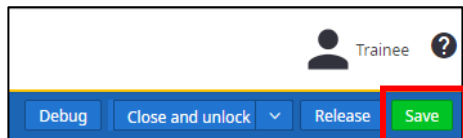


Note: You can click Undo to go back to the previous layout.

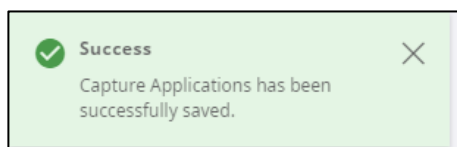
Save the Process

In this part, you will save the process.

10. From the **Ribbon**, click **Save**.



11. Notice the message at the bottom right hand corner stating that the process has been saved successfully. This message will disappear after a few seconds.



12. The process is **Saved** with a version number of 0.01. Each time you click **Save** the version number will increment by 0.01.

13. From the **Ribbon**, select **File > Info** to view the **Version**, **Creation date**, and **Author**.

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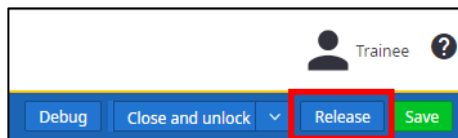
File	Design	Variables	States	Milestones	Roles	Notes
<div>Info</div> <div>Associations</div> <div>Export...</div> <div>Version history</div>	Last modified by			Trainee		
	Last modified date			06/03/2019 23:32:57		
	Status			Saved		
	Version			0.01		
	Creation date			06/03/2019 23:05:10		
	Author			Trainee		

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

Release the Process

In this part, you will release the process.

15. From the **Ribbon**, click **Release**.



16. Notice the message stating the process has been released successfully. This message will disappear after a few seconds.

File	Design	Variables	States	Milestones	Roles	Notes
<div>Info</div> <div>Associations</div> <div>Export...</div> <div>Version history</div>	Last modified by			Trainee		
	Last modified date			06/03/2019 23:40:07		
	Status			Released		
	Version			1		
	Creation date			06/03/2019 23:05:10		
	Author			Trainee		

17. The process is saved and released with a version number of 1. Each time you click **Release**, the major version number will increment by 1.

Lab 03-3

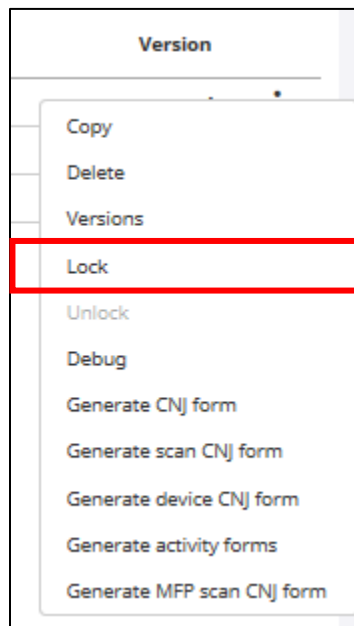
Locking/Unlocking Processes

In this part, you will lock and unlock the process. If you wish to make a change to a process you must first lock the process for modification.

1. From the **Ribbon**, click **Close and unlock**. You are returned to the Business processes list page. Click **Refresh** and notice the process is unlocked.

Business processes Refresh		Type	All	Category	Default Category	Search	Enter name...	Q
New								
Name	Type	Locked by	Last modified by	Last modified date	Version			
Capture Applications	Business process		Trainee	28/06/2019 13:39:04	1			

2. From this Business process **List page** you can see the current version, who last modified the process, and if it is currently locked.
3. Click the : (vertical ellipsis) to the right of the **Capture Applications** process, and from the **Context** menu, select **Lock**. The process is locked under your user account.



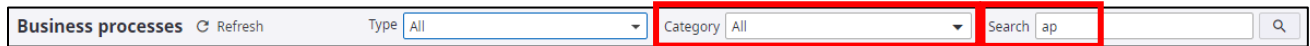
Name	Type	Locked by	Last modified by	Last modified date	Version			
Capture Applications	Business process	Trainee	Trainee	28/06/2019 13:39:04	1			

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Search the Process list page

In this part, you will learn how to search the process list page.

4. In the **Business process** list page, from the **Category** dropdown, select **All**.
5. Click into the **Search** textbox and enter **ap** and press the **Enter** key or click the **Search** icon (the magnifying glass).



Business processes Refresh Type All Category All Search ap

6. The search results are displayed in the **list page**.
Note: You can clear the search by clicking the **x** in the Search box and pressing the **Enter** key or clicking the **Search** icon.
7. **Open the Capture Applications process.**

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In this lab you will create a category. Categories can be used as a filing system for the various TotalAgility objects you create. You can restrict access to categories using permissions.

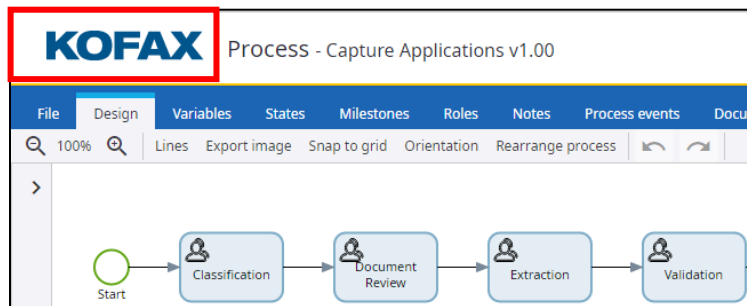
Lab 03-4

Categories

Create a New Category

In this part, you will create a new category.

1. Click the **Home** icon at the top left corner of the Designer.
Note: You can also click on the **Kofax TotalAgility** browser tab.



2. From the **Main** menu navigate to **System > Categories**, and click **New**.



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3. Enter **Applications** as the category name.

New category *

* indicates a required field

Name* Applications

Parent category None

Description

Category access Add

Everyone (Group) x

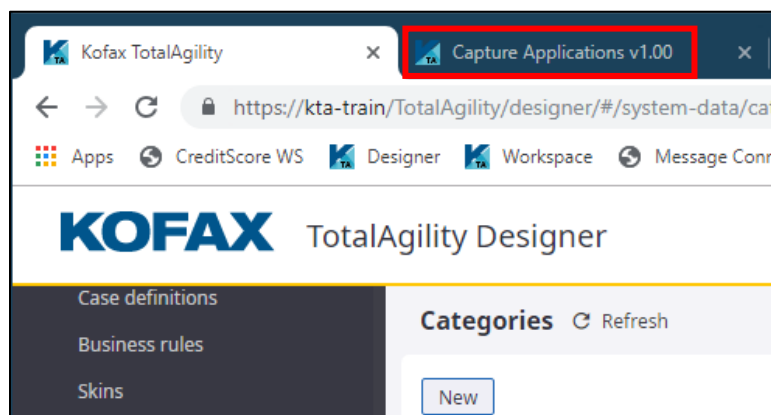
Cancel Save

4. Click **Save**. The new **Category** should be visible in the **Categories** list page.
Note: You can also create a subcategory by specifying a Parent Category (see previous screenshot).

Assign a Process to a Category

In this part, you will assign your process to the new category.

5. Return to the **Capture Applications** process. This should be available in a separate browser tab.



Note: If the process is not active, you can open it from the **Main Menu > Business processes** list page.

6. Click on a blank part of the **Design** area. The process properties are listed on the right.
7. From the **Category** dropdown, select **Applications**.

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> Process - Capture Applications

Name Capture Applications

Description

Type Business process

Category Applications

8. **Release** the **Capture Applications** process.
9. Leave the process open for the next lab.

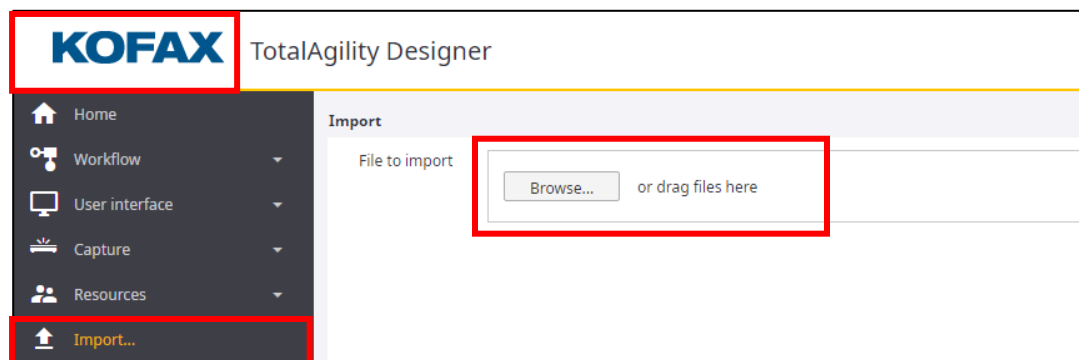
Lab 03-5

Import Distribution Process

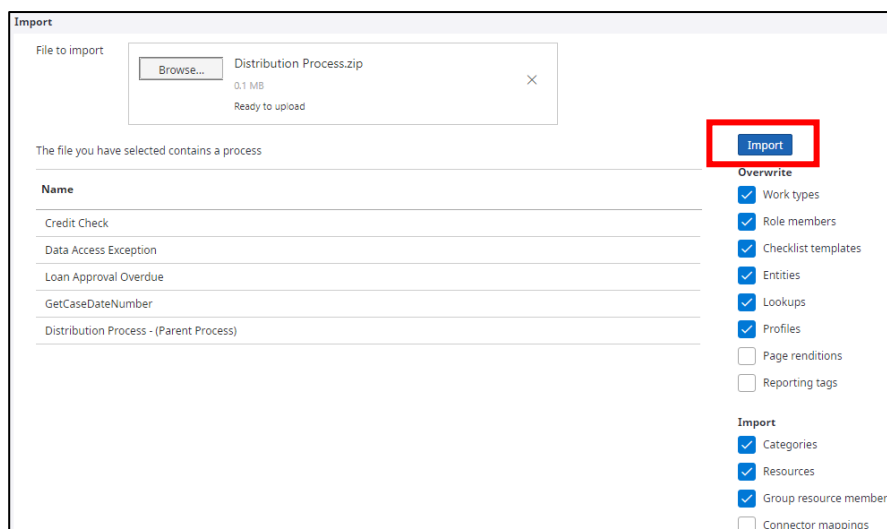
Importing Distribution Process

Before starting the next lab, you will import a Distribution process. This process is used to bring in additional Categories, Resources, and other items that will be used throughout this course.

1. Return to the **Kofax TotalAgility** designer by clicking on the **Home** icon.
2. From the **Main** menu select **Import...**



3. Click **Browse...** and browse to and open:
C:\KTAEssentials\LabFiles\Processes\Distribution Process.zip.



Note: You can also drag and drop zip files into the upload area.

4. Leave all defaults and click **Import**. The process will be imported. Notice the Success message.

Note: If any errors or warning occur, you will be presented with a list.

Lab Notes

WARNING: The Lab Notes sections are for information only. Please do not complete in class.

Login to Designer using Azure

As part of the agreement with Kofax, a new instance of TotalAgility is created. An email is sent to you detailing your login credentials to both the TotalAgility Designer and Workspace.

1. From your email, click the link to the **TotalAgility Designer**.

Login to Designer using On Premise

During the install of Kofax TotalAgility a Windows user account and password is specified.

2. Open **Chrome**.
3. To access the Designer enter [http\(s\)://servername/TotalAgility/Designer](http(s)://servername/TotalAgility/Designer)
4. To access the TotalAgility Workspace enter [http\(s\)://servername/TotalAgility/Forms](http(s)://servername/TotalAgility/Forms)
5. Enter your username and password (this will not be needed if the system is using Windows Authentication and you have configured Chrome to support Windows Authentication).

Rearrange process

6. This option only works if you have the Pools property (general property of the process) turned off.
7. Pools are part of the BPMN standard, and are not covered on this course.

Capture Starter Pack

TotalAgility ships with a capture starter pack. This includes a package that contains a sample capture process, site, forms, classification and extraction group, and images. You can learn more about the starter pack by reading the Kofax TotalAgility 7.6 documentation which can be downloaded from the Kofax support website. The document is called KofaxTotalAgilityCaptureStarterPackageGettingStartedGuide_EN.pdf. Instructions for importing the package are given below:

8. From the **Main** menu navigate to **Import...**
9. Click **Browse...** and **browse** to and open:
C:\Program Files\Kofax\TotalAgility\Sample Processes\Capture Starter Pack\Capture Starter Pack Package.zip file.
10. Click **Import**.

Revision Questions

1. A process has a version number of 3.04. If you click Save, what will the new version number be?

2. A process has a version number of 3. If you click Release, what will the new version number be?

3. What is the purpose of a Category?

4. Can you revert back to a previous version of a major or minor versioned process?

5. When you select an activity, the icons surrounding the activity are known as the _____ activities?

6. Where are processes stored?
