

Sites, Forms, and Navigation

Work Like Tomorrow.™

KOFAX

What is the Forms Designer?

- Automatically generate forms/screens based on a process
- Customise auto-generated forms
- Automatic Deployment (and preview) when a form is released
- Define navigation bars, headers, and styles
- Incorporate charts based on queries
- Build forms that interact with your own application database
- Link to non TotalAgility web forms (link or embed)
- Apply validation to form controls

Why use the Forms Designer?

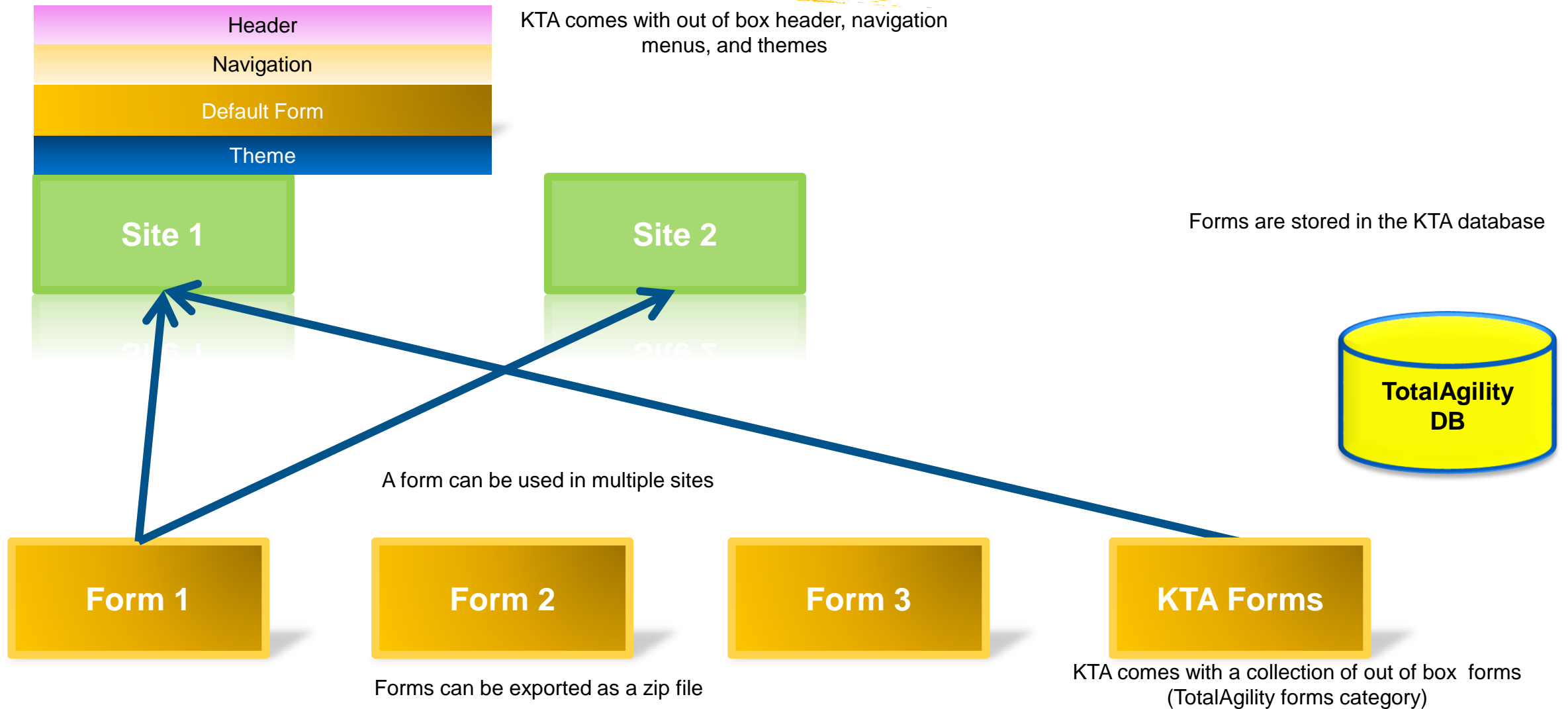


- Benefits of the Forms Designer include:
 - A user-friendly point-and-click forms design tool
 - Initially it can be used to rapidly prototype your business solution
 - Reduces process development and deployment time
 - Less coding and technical/IT staff involvement
 - Has standard adapters that seamlessly integrate forms into your line-of-business processes and automated applications

Sites and Forms

- A site could be created for departments, clients, or groupings of business processes
- You can create multiple sites
- Sites are created in `http(s)://server-name/TotalAgility/Forms/[SITE_NAME]/logon.form`
- The same form can be used in multiple sites e.g.
 - [http\(s\)://server-name/TotalAgility/Forms/Site1/logon.form](http(s)://server-name/TotalAgility/Forms/Site1/logon.form)
 - [http\(s\)://server-name/TotalAgility/Forms/Site2/logon.form](http(s)://server-name/TotalAgility/Forms/Site2/logon.form)
- A site requires a name and a theme at the minimum
- Header Form, Navigation, a Default Form, and Languages can also be configured when creating a site
 - [http\(s\)://server-name/TotalAgility/Forms/Site2/](http(s)://server-name/TotalAgility/Forms/Site2/) (will use the Default Form)

Forms Architecture



Site Navigation (Menus) and Security

- Can create a new blank navigation bar or can add menu items to the out of box menus e.g. WorkspaceMenu menu
- Can apply a menu to a form
 - Horizontal and Vertical
 - None
- Can set Access Permissions to restrict access to menus/menu items
 - Allow/Deny Everyone Except
- Security Tokens (not covered)
 - Restrict access to specific fields on a form

Training Scenario



- In the training scenario we will:
 - Create a Desktop site
 - Format the site with a theme and header
 - Automatically generate forms for the Capture Applications process
 - Configure site navigation
 - Release forms and test the solution

Create a Site

- Site must have a site **name** and **theme**
- All forms **inherit** the **navigation** of the main site
- All forms **inherit** the **header** and **theme** of the main site
- Navigation, theme, and header can be **overridden** on a specific form

Edit site

** indicates a required field*

Name*

Category*

Languages [Add](#)

Desktop settings

Theme*

Header form

Horizontal navigation

Vertical navigation

Default form

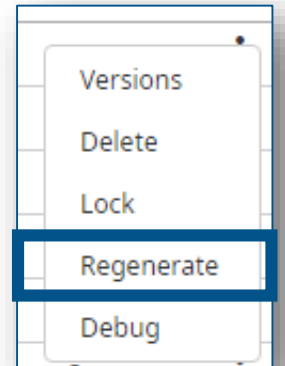
Generating Forms



- Generate Forms
 - Logon (Windows or Manual)
 - Scan create new job
 - Activity
- Create Blank Forms
- Forms Properties
 - Width mode is set to Percentage by default i.e. will fill the width of the screen
 - Use Rows/Columns/Cells to position controls (textbox, calendar, buttons) on the form

Regenerating Forms

- Under certain circumstances it may be necessary to regenerate an existing form
- Examples
 - You add a new initialization variable to the process
 - You add a new input/output variable to an activity
- You do not have to regenerate the Scan create new job form if you:
 - Change the folder types name or fields
 - Change a folder variables value
 - Change the separation profile itself or choose a different profile in the process properties



In this course you will not need to regenerate forms

Testing

Testing the new Site and Process

Scan Create New Job Form



- **Scan** documents using a web form
- You must build the **Scan create new job** web form for the Capture Applications process
- Documents separated into single page documents and stored in a folder and added to the **TotalAgility_Documents** database
- A **Job** (instance of the Capture Applications process) is created for this batch of documents
- The job is initialized with a **folder** of documents

Create A Job/Case in the TotalAgility Workspace

- Logon to **xyzbank** website to create a job/case
- <https://kta-train/TotalAgility/Forms/xyzbank/>
- Logon as pblack
- A job is an instance of a design time process
- Testing Features
 - Create a job/case
 - View a general work queue
 - Take manual activities
 - Job List and Job Properties
 - View Process (while running)

Running Job

The screenshot displays the TotalAgility Workspace interface. At the top, a navigation bar includes 'To Do', 'Scan Applications', 'Jobs', 'Resources', 'Administration', and 'Test Val'. Below this, a 'Jobs' section shows a list of processes. A blue arrow points from a text box 'Running job – click to view details' to the 'Capture Applications' job entry. Another blue arrow points from a text box 'View Job' to the 'View Job' option in the left sidebar. The main area shows the 'Capture Applications' job details, including a flowchart with steps: Classification, Document Review, Extraction, and Validation. A 'Color Legend' panel on the right lists various job states with corresponding colors.

Process	SLA (Job)	Expected Duration	Creator	Priority	Status	Version	Action
<input type="checkbox"/> Capture Applications		8/15/2018 4:14:26 PM	Paul Black	1	Active	13	Select
<input type="checkbox"/> Capture Applications		8/15/2018 4:16:38 PM	Paul Black	1	Active	13	Select
<input type="checkbox"/> Capture Applications					Active	13	Select

Job Details

- History
- Document Set
- Variables
- Milestones
- Notes
- Events
- State History
- Roles
- View Job
- Adhoc Task
- Unlock

Flowchart: Classification → Document Review → Extraction → Validation

Color Legend:

- Completed
- Taken
- Awaiting Allocation
- Awaiting Events
- On Hold
- Pending Completion
- Saved
- Suspended

Activity Statuses

- **Activity Statuses** (not exhaustive)

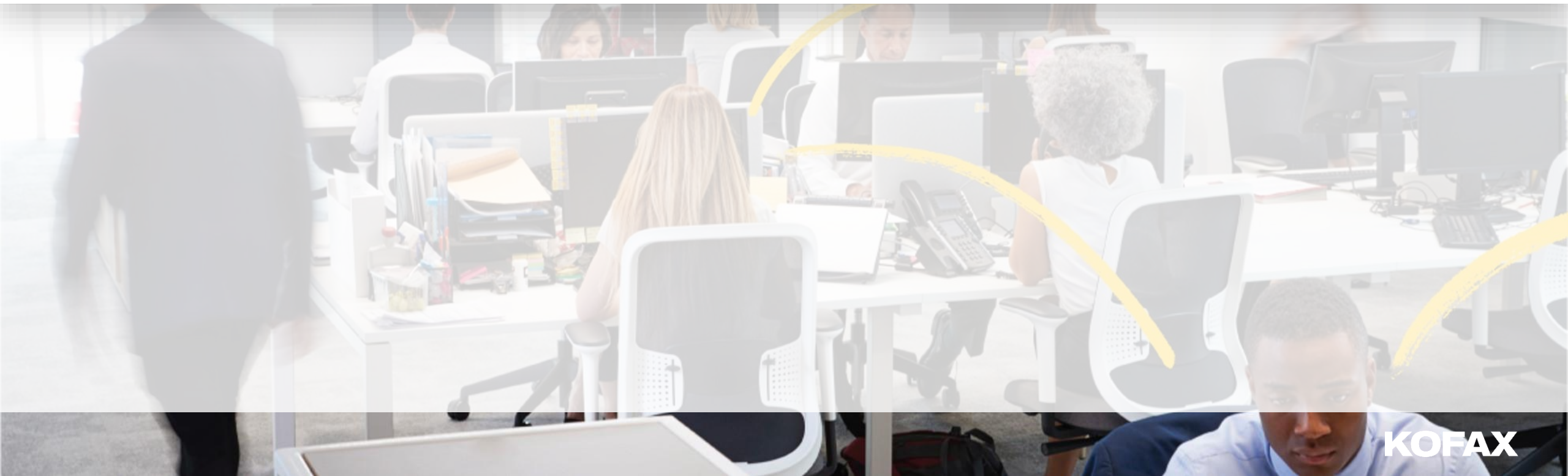
- Pending
- Taken
- Saved
- On Hold
- Awaiting Events
- Completed
- Suspended

- **Activity Actions:**

- Complete
- Cancel (go back to Pending)
- Save



TotalAgility Workspace



Overview



- TotalAgility Workspace

What is Kofax TotalAgility Workspace?

- Out of box friend end that allows you to create cases/jobs and test processes
- You can also use it to:
 - Create jobs
 - Search for jobs and view their properties
 - View a resource's work queue or job list
 - Filter the job list / work queue
 - Take and complete activities
 - Add notes
 - Examine a runtime instance of a process (job status)
 - Customise a live process or live job properties

What is Kofax TotalAgility Workspace?



- Place a job on hold or reactivate a job
- Change a job's state or owner
- Terminate, suspend or recover jobs
- Set skill levels for processes and resources
- Run reports

Launching TotalAgility Workspace



- [http\(s\)://server-name/TotalAgility/Forms](http(s)://server-name/TotalAgility/Forms)

Creating a Case Instance (Job)

- You can create jobs or cases using the TotalAgility Workspace
Jobs > Create
- Select the Job or Case radio button
- Provide a **Case Reference** (unique identifier) (if you are creating a case)

Create Jobs

☐ Job ☒ Case ☐ Job in Case

Category: Personal Loan

Process: Loan Application

Case Ref: RD001

Create

Creating a Case Fragment

- You can create an instance of a fragment using the TotalAgility Workspace
 - **Jobs > Create**
- Select **Job In Case**
- Select the **Fragment** process
- Enter the **Case Reference** and click **Create**

The screenshot shows the 'Create Jobs' interface. At the top, there's a navigation bar with tabs: 'To Do', 'Scan Applications', 'Jobs', 'Resources', 'Administration', and 'Test Val'. Below this, the main heading is 'Create Jobs'. Underneath, there are three radio buttons: 'Job', 'Case', and 'Job in Case'. The 'Job in Case' option is selected. Below the radio buttons, there are three input fields: 'Category' (containing 'Personal Loan'), 'Process' (containing 'Change of Address'), and 'Case Ref' (containing 'RD001'). At the bottom left, there is an unchecked checkbox labeled 'Business Process Maps'. At the bottom center, there is a blue button labeled 'Create'.

- A fragment has its own job id and is a job associated with the main case

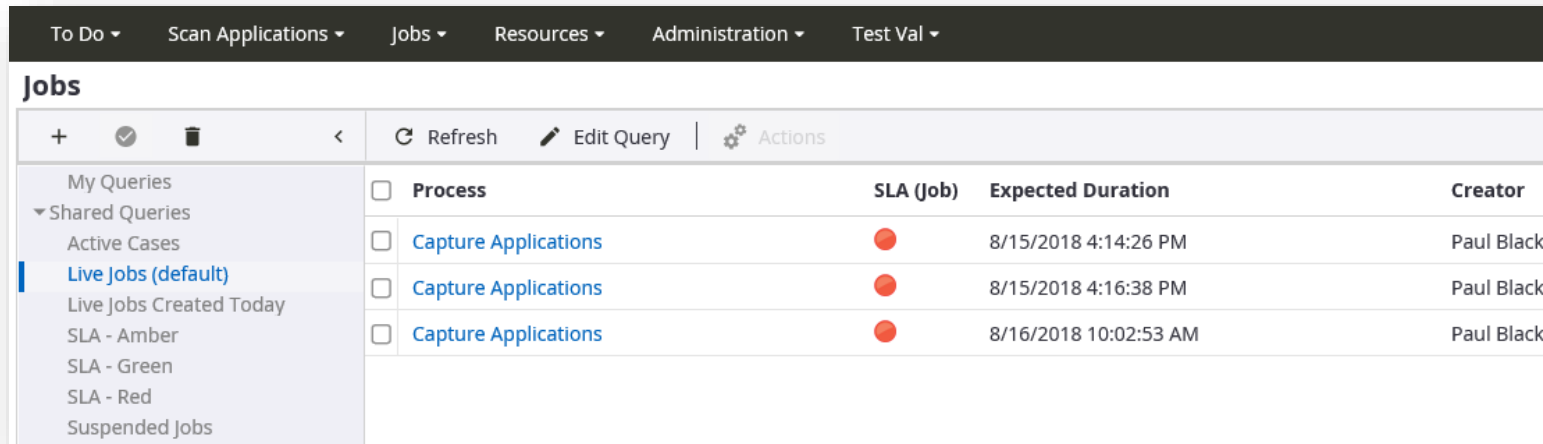
Search for Jobs



- You can search for and take some action on a job e.g.
- Select **Jobs > Find**

Search for Jobs

- Default is to search for Live Jobs



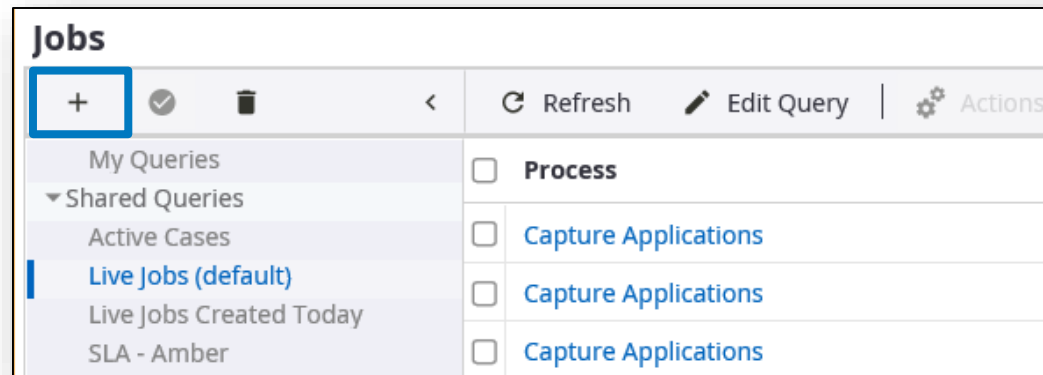
The screenshot shows the 'Jobs' section of a software interface. At the top is a navigation bar with links: 'To Do', 'Scan Applications', 'Jobs', 'Resources', 'Administration', and 'Test Val'. Below this is a 'Jobs' header with a sidebar on the left containing a tree view of queries: 'My Queries', 'Shared Queries' (expanded), 'Active Cases', 'Live Jobs (default)' (selected), 'Live Jobs Created Today', 'SLA - Amber', 'SLA - Green', 'SLA - Red', and 'Suspended Jobs'. The main area displays a table of jobs with columns: 'Process', 'SLA (Job)', 'Expected Duration', and 'Creator'. There are three rows of jobs, all with a red status indicator.

Process	SLA (Job)	Expected Duration	Creator
<input type="checkbox"/> Capture Applications	●	8/15/2018 4:14:26 PM	Paul Black
<input type="checkbox"/> Capture Applications	●	8/15/2018 4:16:38 PM	Paul Black
<input type="checkbox"/> Capture Applications	●	8/16/2018 10:02:53 AM	Paul Black

- Can search for Live Jobs Created Today, Jobs based on their SLA status, or write a custom query

Create a Query

- Click Create (+ sign)



Create a Query

- Enter query criteria and **Save**

Jobs *

+ ✓ 🗑️ < Save Save As ▶ Run Columns Share Cancel

My Queries
▼ Shared Queries
Active Cases
Live Jobs (default)
Live Jobs Created Today
SLA - Amber
SLA - Green
SLA - Red
Suspended Jobs
test

Query Name Return Query Total ☐

CRITERIA

Work Type	<input type="text" value="None"/>	Job ID	<input type="text"/>
Case Ref	<input type="text"/>	Category	<input type="text" value="Personal Loan"/> <input type="checkbox"/> Sub Categories
Type	<input type="text" value="All"/>	Process Map	<input type="text" value="Loan Application"/>
Created By	<input type="text"/> Clear	Version	<input type="text" value="All"/>
Job Owner	<input type="text"/> Clear	Status	<input type="text" value="Suspended"/>
Job State	<input type="text"/>	Retrieval Limit	<input type="text" value="100"/> <input type="checkbox"/>
Priority	<input type="text" value="All"/>	Job SLA	<input type="text" value="All"/>
Score	<input type="text" value="All"/>	Suspend Reason	<input type="text"/>

▼ DATES
▼ METADATA

Viewing the Properties of a Job

- If a job is of type case (definition), the case properties are displayed and the case details menu is provided

The screenshot displays the Kofax software interface for viewing job properties. The top navigation bar includes 'To Do', 'Scan Applications', 'Jobs', 'Resources', 'Administration', and 'Test Val'. The left sidebar lists various options, with 'Properties' highlighted. The main content area is divided into several sections:

- Progress:** A green banner indicates '6 Days Remaining'. Below it, a circular progress indicator shows '0%'.
- PROPERTIES:** A table listing job details:

Case Ref	RD001
Case Type	Loan Application
Created On	8/16/2018 10:26:54 AM
Case Owner	Paul Black
Created By	Paul Black
- STATUS:** A table showing job status:

Expected Finish	8/23/2018 10:26:54 AM
Open For	0d 0h 3m 5s
Time Spent	0d 0h 0m 0s
State	
Status	Active
- Activity List:** A table with columns: Activity Name, Process, Priority, Due Date, Assigned To, and Activity SLA.

Activity Name	Process	Priority	Due Date	Assigned To	Activity SLA
Loan Approval	Loan Application	1	8/17/2018 10:56:57 AM	Approving Officers	<div></div>

Viewing the Properties of a Job

- If a job is of type fragment or business process, the job properties are displayed and the job details menu is provided

The screenshot displays the 'Job Details' section of a Kofax application. The top navigation bar includes 'To Do', 'Scan Applications', 'Jobs', 'Resources', 'Administration', and 'Test Val'. The left sidebar menu lists 'Job Details' (highlighted), 'History', 'Document Set', 'Variables', 'Milestones', 'Notes', 'Events', 'State History', 'Roles', 'View Job', 'Adhoc Task', and 'Unlock'. The main content area is titled 'Properties' and features a toolbar with actions: Refresh, Activate, Change owner, Change state, On hold, Recover, Suspend, Terminate, and Re-evaluate. Below the toolbar, the properties are organized into three sections: GENERAL, TIME, and COST. The GENERAL section includes Job ID, Created By, Process, Version, Owner, Status, Score, SLA, State, and State Percentage. The TIME section includes Created On, Expected Duration, Expected Finish, Time Spent, Actual Finish, and Current Duration. The COST section includes Expected Cost, Current/Actual Cost, Spend, and Budget.

Properties					
<div>Refresh Activate Change owner Change state On hold Recover Suspend Terminate Re-evaluate</div>					
GENERAL					
Job ID	A43959D14A2142AA85BC5142B677ACBB		Owner	Paul Black	SLA
Created By	Paul Black		Status	Active	State
Process	Capture Applications		Score	0	State Percentage
Version	13				0%
TIME					
Created On	8/15/2018 4:14:26 PM		Time Spent	0 Days 0 Hours 0 Minutes 4 Seconds	
Expected Duration	0 Days 0 Hours 0 Minutes 0 Seconds		Actual Finish		
Expected Finish	8/15/2018 4:14:26 PM		Current Duration	0 Days 0 Hours 0 Minutes 5 Seconds	
COST					
Expected Cost	0		Spend	0	
Current/Actual Cost	0		Budget	0	