In this lab we will look at configuring a process so that documents and associated data are exported from TotalAgility. We will look at exporting field data and images using a Text export connector.

Lab 17-1

Export Images using the Text Export Connector

Configure a Process for Text and Image Export

In this part, we will configure the Capture Applications process to export an image and text to the local C:\Export\ folder after it has been processed. We will only do this for the standard Loan Application documents.

1. From the **Main** menu navigate to **Workflow > Business processes**, and open the **Capture Applications** process.

2. From the **Properties** panel, select the **Capture** tab.

3. Confirm the **Classification group** field has been set to **Loan Applications**.

>	Process - Capture Applications	
ⓘ	Classification group	Loan Applications × ▾
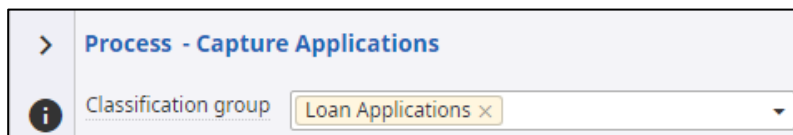
Note: We need to connect the process to the Extraction groups we need to export. This can be achieved by setting the Classification Group. The Connectors will then display any document types associated with the Classification group.

Configure the Capture Applications Process to Export Text and Image

In this part, you will add an Export activity to the process. The Export activity will run all export connectors associated with a document type.

4. From the **Ribbon**, select the **Variables** tab, and create the following new variables:

Export Success	EXPORT_SUCCESS	Bool	false
Exported	EXPORTED	Dynamic complex	
Not Exported	NOT_EXPORTED	Dynamic complex	

Note: A dynamic complex variable (array) is used to store information such as document ID, connector name, error message, document type ID, and document type name for documents that are exported or not exported (due to an export failure) at runtime.

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

6. Select the **Create Case Reference** activity and add a new activity.

7. Name the new activity as **Export**.

8. Delete the connection between **Create Case Reference** and the **Loan Application Process** activity.

9. Connect the **Export** activity to the **Loan Application Process** activity.

10. On the **Design** tab, click **Rearrange process**.

11. The process should look soemthing like this:
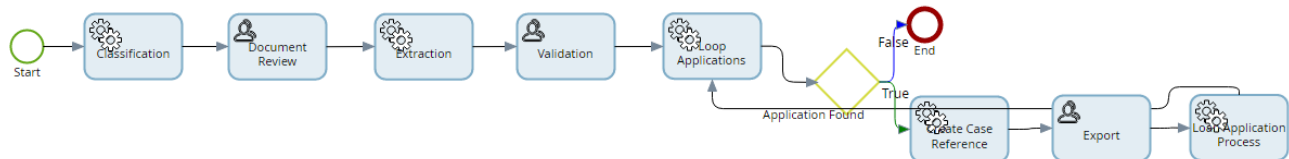
12. Select the activity named **Export**.

13. From the **Properties** panel, from the **Type** dropdown, select **Export** (Capture group).

14. In the **Configuration** area, from the **Input document/folder** dropdown, select **Application Document**.

15. In the **Configuration** area, set **Export success indicator**, **Documents not exported**, and **Documents exported** fields to the relevant variables (leave all other options at the default). The configuration should look like this:


16. **Release** and **Close and unlock** the process.

Configure the Text Export Connector

In this part, you will install the Text Export connector.

17. **Navigate** to C:\KTAEssentials\LabFiles\Export Connector\KofaxExportConnector-1.0.0_For_Text\Installer\

18. Right-click on the **kec-text.msi** file and click **Install**. Accept license, all defaults, and install.

19. Click **Start** > **Kofax TotalAgility** > **Kofax Export Connector**.

20. Click **Setup**.

21. Select **Capture Applications** as the **Process**.
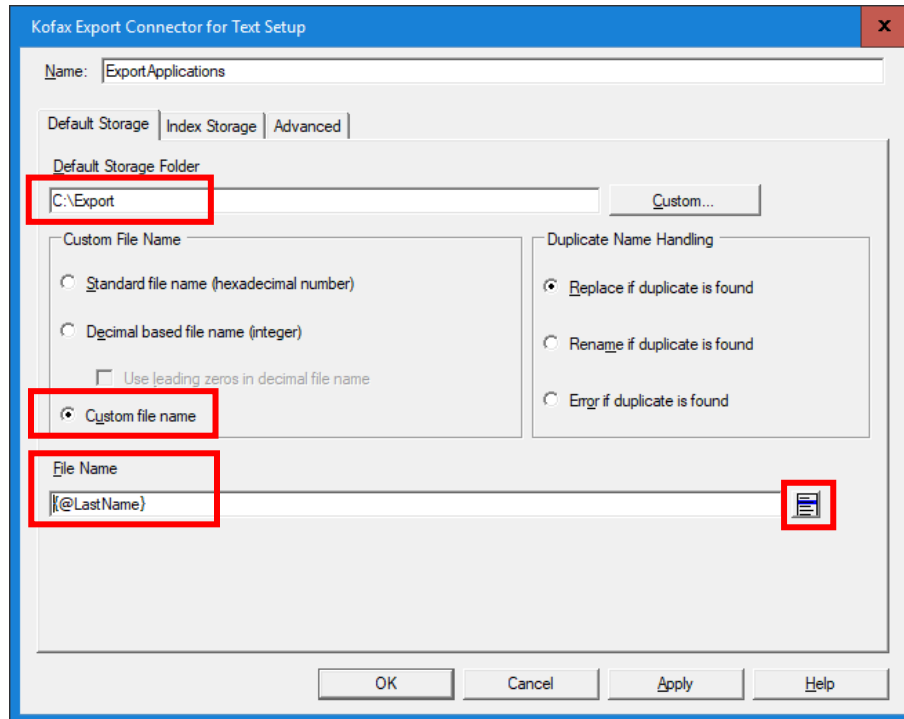
22. Select **Standard** and click **Add >>.**
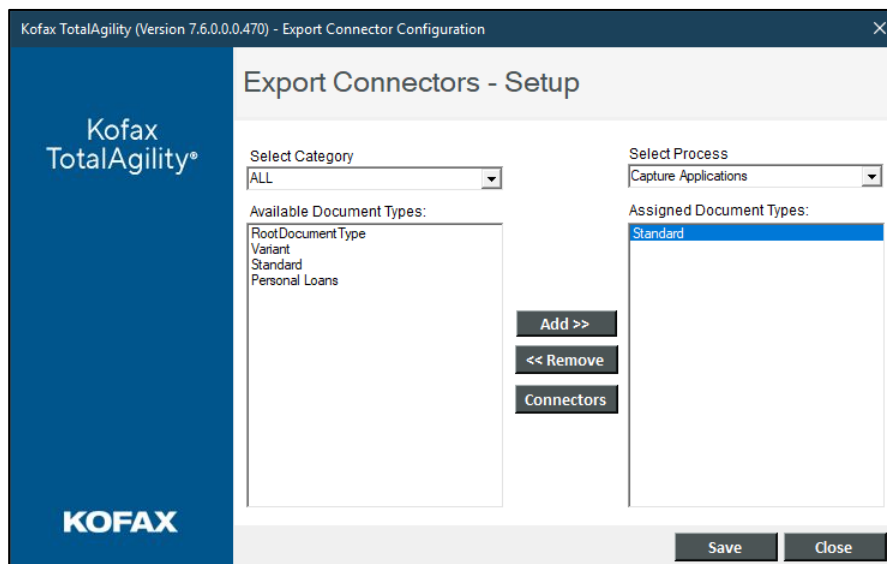
23. Select **Standard** and click **Connectors**.

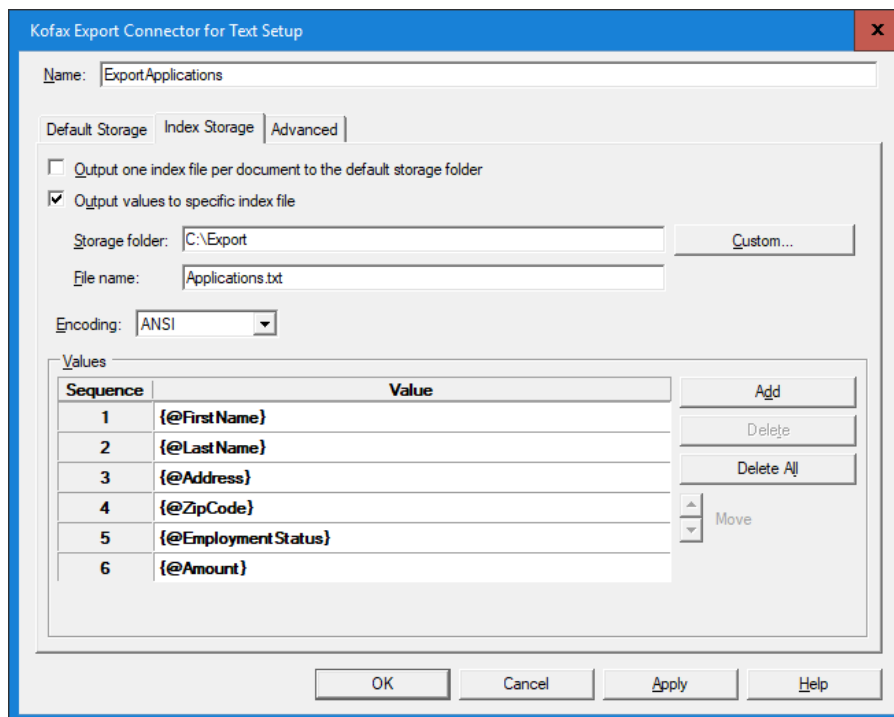24. With the **Text Export Connector** selected click **Add >>**.
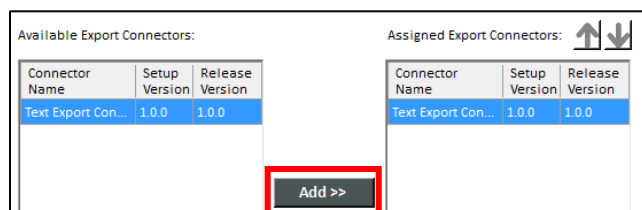
25. Set the name to be **ExportApplications**.

26. Set the **Default Storage Folder** as **C:\Export**.

27. Set the **Custom File Name** to {@LastName} by selecting **Index Fields > LastName**.

28. Select the **Index Storage** tab.
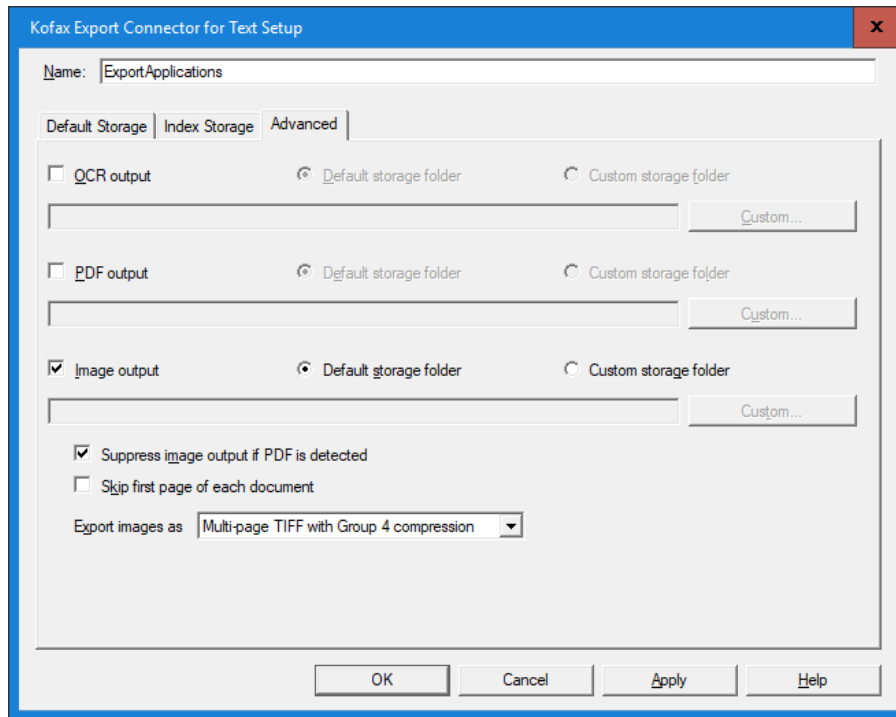

29. Turn off **Output one index file per document to the default storage**.

30. Select **Output values to specific index file**.

31. Set **Storage folder** to **C:\Export** and set **File name** to **Applications.txt**.

32. Select the **Advanced** tab.

33. Turn off **OCR output** and **PDF output**, leave other options as default.

34. Click **OK**.

35. Click **Save** twice, and **close** the Export connector screen (click X in top right corner).

36. You may want to repeat steps 20 through 34 for the Variant document type. Every document type must have an Export Configuration, or it will not be exported at runtime.

37. **Test** the export by logging in to the **xyzbank** workspace as **pblack**, and creating a new **Job** using 2 test **standard** documents (Anthony and Aria).

38. You will need to complete **Document Review** and **Validation** activities to validate the export. The field names and values and image(s) will be exported to C:\Export folder.
Note: If you have not completed the Export configuration for the Variant document type (as per the previous point), ensure you scan only Standard documents when testing.
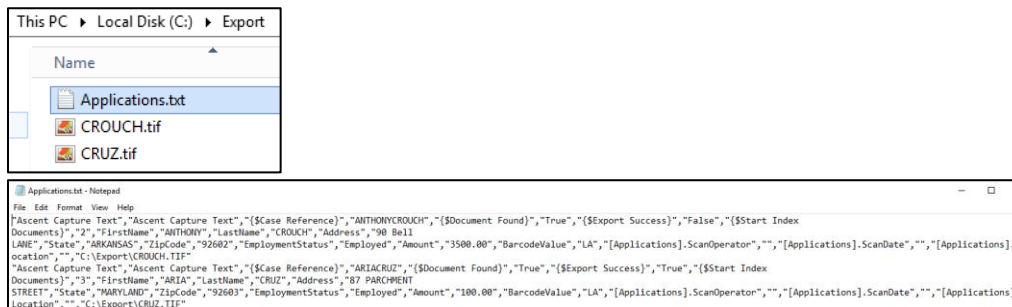
Lab Notes

Downloading the Text Export Connector

1. You can download the latest Export Connector from the Kofax Electronic Delivery Software site. Search for Product = Kofax Capture and File Type = Export Connector.

2. You *must* use **WinRar** to extract Version 1 of the Text Export Connector.

Exporting Export Connector Settings

3. You can export the Export Connector configuration in a package if you need to transfer the export connector configuration to a different server.

Revision Questions

1. What connector could you use to export .tiff image and its index fields and values?
   _____

2. Documents that are not successfully exported are stored in which variable type?
   _____

3. What does the export activity do when executed in a process?
   _____
   _____

4. Which export connectors are shipped with the TotalAgility product?
   _____