

Customize Forms

Work Like Tomorrow.™

KOFAX

Overview



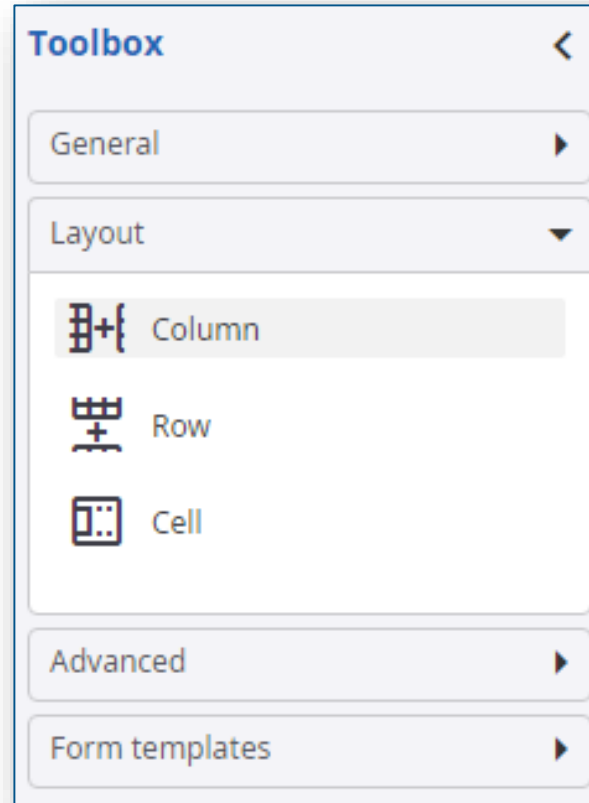
- Save, Release, and Revert
- Controlling Form Layout
 - Rows, Columns, Cells
 - Moving controls
- WYSIWYG
- Adding Form Controls
 - Textbox
 - Dropdown
 - Web Capture
- Form Events
- Adding/Editing Form Actions
 - Action Types
- Training Scenario
- Self Learning

Saving, Releasing, and Reverting Forms

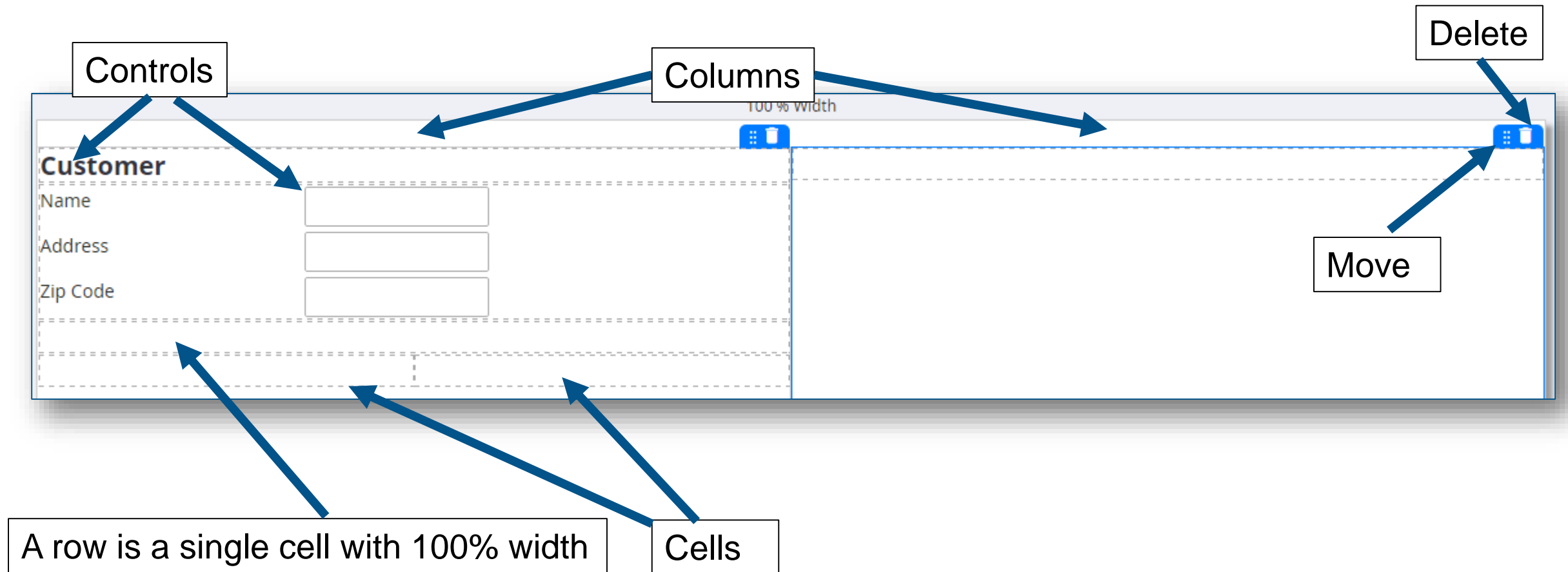
- Forms have **versions**
- You can Save (minor version) or Release (major version)
- All sites use the latest **Released** version of the form
- Forms are stored in the TotalAgility Database as XML and rendered at runtime as HTML/JavaScript pages
- On release you can refresh the browser page by clicking on the page and pressing F5 or CTRL + F5 (do not use cache)
- Can **Revert** to previous version of a form

Add Rows, Columns, Cells using the Toolbox

- Open the form
- Click Layout in the toolbox
- Click Row in the toolbox
- Select the row
- Click Cell in the toolbox
- Add a new row
- Click Column in the toolbox



Add Rows, Columns, Cells using the Toolbox



Form Layout

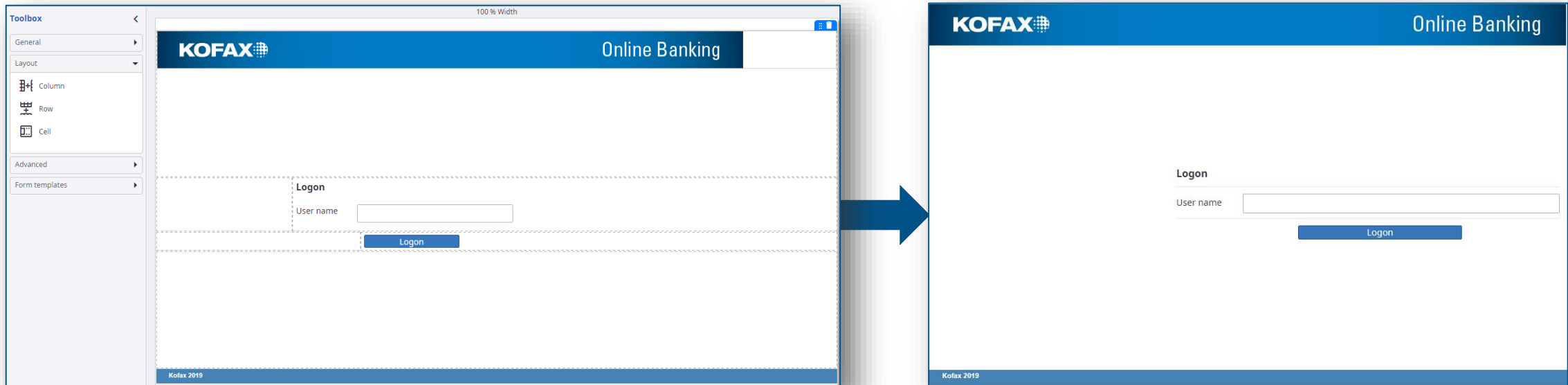
- A form can consist of a number cells that can be used to layout the controls on the form
- You can add rows (single cell that spans the form width), columns, and cells
- By default, forms use a Percentage Width mode (100%)
- Rows will shrink by default if there is no content
- You can change the orientation of a cell so that controls appear horizontally rather than vertically aligned
- You can change the width of cells
- You can set the Collapsed and Collapsible properties of a cell

Form Layout

The screenshot displays the Kofax Online Banking form layout editor. On the left is a 'Toolbox' panel with sections for 'General', 'Layout', 'Advanced', and 'Form templates'. The 'Layout' section is active, showing icons for 'Column', 'Row', and 'Cell'. The main workspace shows a form layout with a blue header bar containing the 'KOFAX' logo and 'Online Banking' text. Below the header is a 'Logon' section with a 'User name' label and a text input field, followed by a blue 'Logon' button. The footer of the form contains the text 'Kofax 2019'. The interface also includes a '100 % Width' status bar at the top right and a trash icon in the top right corner of the workspace.

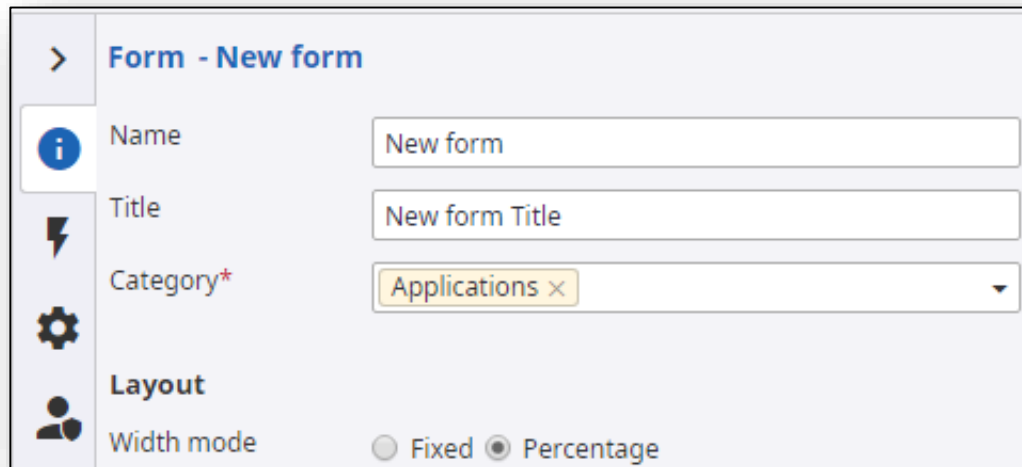
WYSIWYG

- The forms designer is WYSIWYG
- You will automatically see at design time what the form will look at run-time in a browser



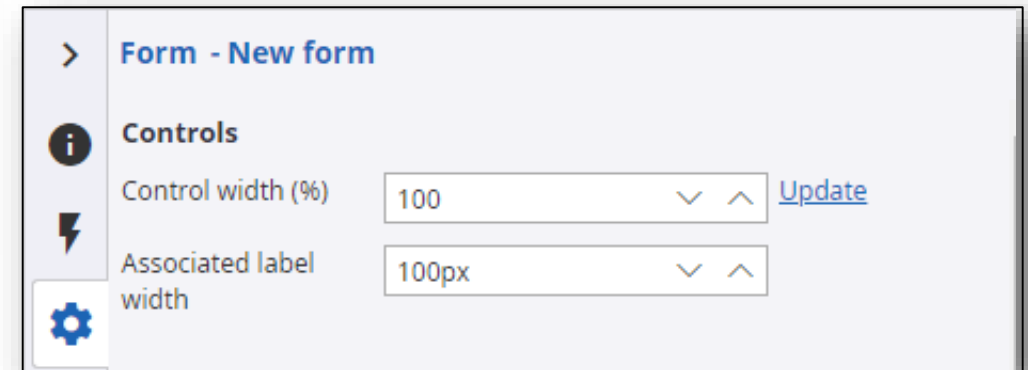
Form Properties

- You can change form properties by selecting the form and locating the Properties panel
- Form name and title can be changed
- You can update all control widths and label widths using Form properties



The screenshot shows the 'Form - New form' properties panel. It has a sidebar with icons for information (i), lightning bolt, settings (gear), and users. The main area contains the following fields:

- Name:** A text input field containing 'New form'.
- Title:** A text input field containing 'New form Title'.
- Category*:** A dropdown menu with 'Applications' selected and a close button (x).
- Layout:** A section with a 'Width mode' option, featuring two radio buttons: 'Fixed' and 'Percentage' (which is selected).

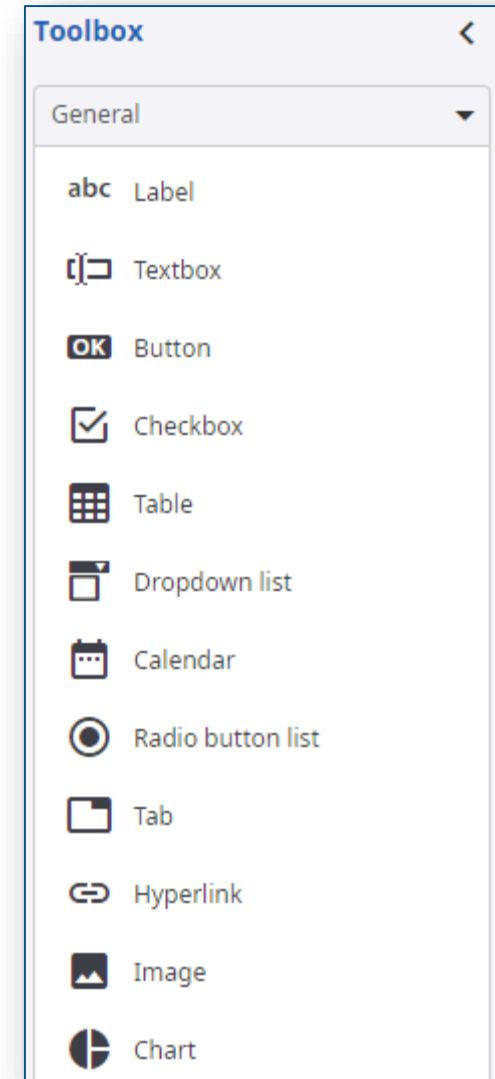


The screenshot shows the 'Form - New form' properties panel with the 'Controls' section selected in the sidebar. The main area displays width settings:

- Control width (%):** A numeric input field set to '100', with up/down arrows and an 'Update' link.
- Associated label width:** A numeric input field set to '100px', with up/down arrows.

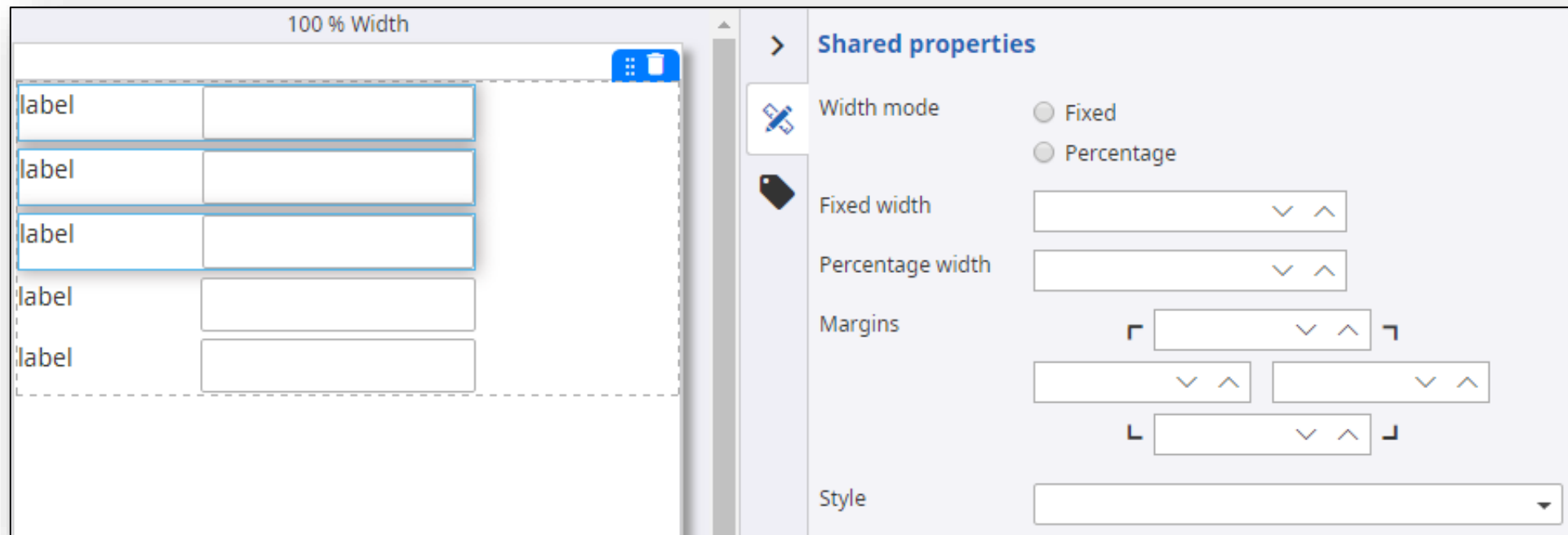
Adding Form Controls from the Toolbox

- Select a cell
- Click on the relevant control in the toolbox
- Each control has Properties
- You can access additional controls by clicking on the Advanced toolbox
- You can define Form Templates (a collection of fields that you might need to add to multiple forms)



Control Properties

- You can modify a controls properties e.g. a Textbox by selecting the control and locating the Properties panel
- You can also select multiple controls using the **CTRL** key and set **Shared properties**



Events

- Most controls (and the form itself) have **events** that respond to a users action, e.g. clicking a button
- Multiple actions can be executed when an event occurs
- **Form Event**
 - Loaded - Fired just before the form is displayed
- **Control Events**
 - Clicked - Fired when the user clicks a button / image button
 - Selection changed - Fired when the user changes a text box, drop-down, check box, radio button, or calendar
 - Row selected - Fired when the user selects a row in a table

Action Types

- General
 - **Apply validation** - run validation
 - **Calculation rule** - runs a pre-defined calculation
 - **Change stack order** – change the order of stacked images
 - **Clear** - clears text box values
 - **Clear selection** - clears the selections of a drop-down and table at run time
 - **Close** - closes the form
 - **Display rule** - e.g. hide or show controls based on a condition
 - **File upload** - uploads a file to a specified path
 - **Redirect** - redirects to another form
 - **Reset form variables** - resets the data of one or more form variables
 - **Same page** - redirects to the same page and allows target controls/fields/variables to be set
 - **Set focus** - sets the focus on a control in a form
 - **Set device** - allows end users to switch between desktop/phone/tablet versions of a form
 - **Update control** - reload and refresh results of work queue , job list, system queries

Action Types

- Integration
 - **.Net method** - executes a .NET method
 - **Business rule** - invokes the business rule when the configured control is clicked
 - **DB query** - runs a database query (SQL Server)
 - **Web service** – call a SOAP, SOAP WCF, or Restful web service
 - **RPA** – call a robot
 - **JavaScript** – call JavaScript code
- Condition
 - **Begin and End condition** – specifies when the event should fire and fires the event only if the condition is satisfied (multiple events may be created between Begin and End Condition events)
 - **Else condition** – used in conjunction with Begin, actions within the Else Condition are executed if the Begin condition is not met

Action Types



- **Table**

- Add row – adds a row to a table
- Delete row – deletes a row from a table
- Update row - updates rows in a table

- **Composite**

- Create an action that will run multiple actions

- **Web capture**

- Perform web capture actions on a web capture control e.g. Save, Import, Scan, Delete Page, Zoom In etc.

Themes, Header, and Navigation

- Create or apply a Theme
 - Can use out of box theme or create your own
 - Can plug in a CSS file
 - Theme is applied to the site
- Header form
 - WorkspaceHeader (out of box form that can be customised)
 - Can create your own header
 - Can turn header on/off for a specific form e.g. logon form
- Navigation
 - Can turn vertical/horizontal navigation on/off for a specific form





The screenshot shows a 'New theme' form with a 'General' tab selected. The form includes fields for Name, Category, Description, Desktop style, Touch style, Override font/background, and Stylesheet. The 'Name' field is filled with 'XYZ Bank'. The 'Category' dropdown is set to 'Applications'. The 'Description' field is empty. The 'Desktop style' dropdown is set to 'Gray'. The 'Touch style' dropdown is set to 'TotalAgilityWorkspace'. The 'Override font/background' checkbox is unchecked. The 'Stylesheet' dropdown is set to 'ThemeCharcoal.css'. A red asterisk indicates required fields.

New theme *	
* indicates a required field	
General	
Name*	XYZ Bank
Category*	Applications x
Description	
Desktop style*	Gray
Touch style*	TotalAgilityWorkspace
Override font/background	<input type="checkbox"/>
Stylesheet	ThemeCharcoal.css x

Themes

KOFAX

TotalAgility Workspace



To Do ▾

Scan Applications ▾

Jobs ▾

Resources ▾

Administration ▾

Work Queue

+

✓


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🔄 Refresh

✎ Edit Query

	Activity Name	Process	Priority	Due Date	Assigned To
<div>My Queries</div> <div>▼ Shared Queries</div> <div>Alerts</div> <div>All Activities (default)</div> <div>All Work Due This Week</div>	Validation	Capture Applications	1	01/07/2019 14:46:24	Everyone
	Validation	Capture Applications	1	01/07/2019 14:48:55	Everyone

 TotalAgility Workspace



To Do ▾

Scan Applications ▾

Jobs ▾

Resources ▾

Administration ▾

Work Queue

+




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🔄 Refresh

✎ Edit Query

	Activity Name	Process	Priority	Due Date	Assigned To	SLA (Activity)	Actions
<div>My Queries</div> <div>▼ Shared Queries</div> <div>Alerts</div> <div>All Activities (default)</div> <div>All Work Due This Week</div> <div>All Work Due Today</div>	Loan Approval	Loan Application	1	9/20/2018 3:17:59 PM	Approving Officers		Select ▼
	Loan Approval	Loan Application	1	9/20/2018 3:18:29 PM	Approving Officers		Select ▼
	Document Review	Capture Applications	1	9/24/2018 9:17:01 AM	Everyone		Select ▼

Header

KOFAX TotalAgility Workspace



To Do ▾Scan Applications ▾Jobs ▾Resources ▾Administration ▾

Work Queue

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🔄 Refresh

✎ Edit Query

My Queries

▼ Shared Queries

Alerts

All Activities (default)

All Work Due This Week

Activity Name	Process	Priority	Due Date	Assigned To
Validation	Capture Applications	1	01/07/2019 14:46:24	Everyone
Validation	Capture Applications	1	01/07/2019 14:48:55	Everyone

Header and Navigation Menus

Header form

Horizontal menu

Vertical menu

Default

Default

None

Other

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Navigation

KOFAX TotalAgility Workspace



To Do ▾

Scan Applications ▾

Jobs ▾

Resources ▾

Administration ▾

Work Queue

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🔄 Refresh

✎ Edit Query

My Queries

▼ Shared Queries

Alerts

All Activities (default)

All Work Due This Week

Activity Name	Process	Priority	Due Date	Assigned To
Validation	Capture Applications	1	01/07/2019 14:46:24	Everyone
Validation	Capture Applications	1	01/07/2019 14:48:55	Everyone

Header and Navigation Menus

Header form

Default

▼

Horizontal menu

Default

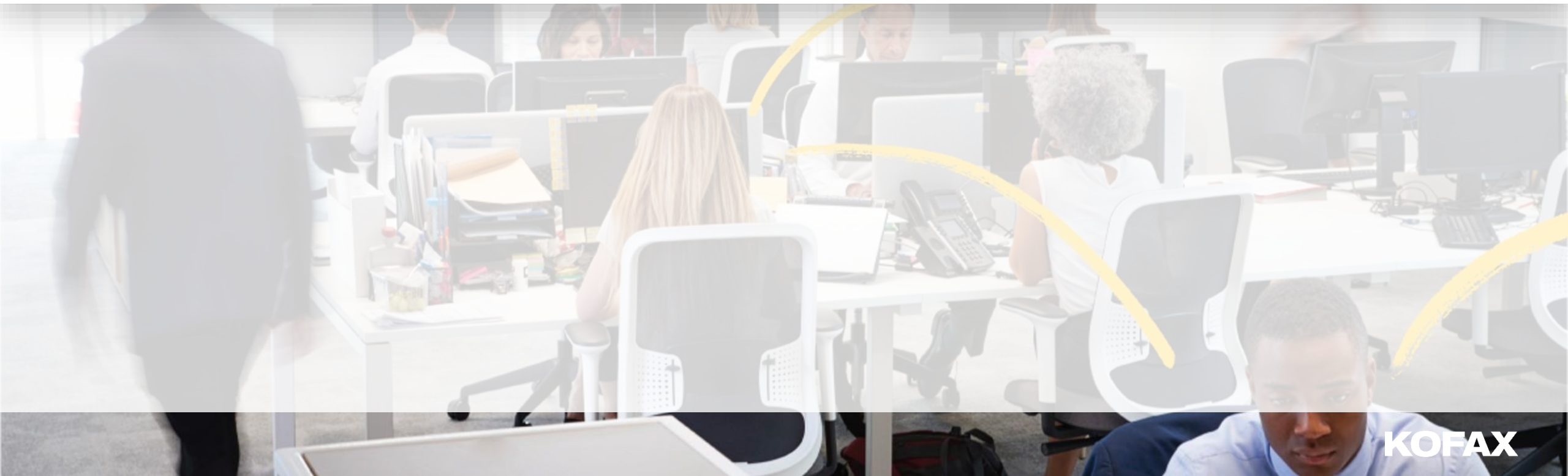
▼

Vertical menu

None

▼

Training Scenario



Training Scenario



- Customise Loan Approval form:
 - Reposition fields
 - Add column and rows
 - Set control width (%)
 - Set mandatory field and error message
 - Add a dropdown list to Approve/Reject the loan (replace the checkbox)
 - Add a Web Capture control to view the application document
 - Edit form Actions
- Create and Apply Theme
- Apply/Remove a Menu from a form

Training Scenario



- Self Learning
 - Customize Logon Form
 - Add image, cell color etc.
 - Control Redirect Behaviour

Completed Loan Approval Form

KOFAX TotalAgility Workspace

To Do ▾Scan Applications ▾Jobs ▾Resources ▾Administration ▾

Loan Approval01/07/2019 17:09:50

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

Information

Customer Id1

First NameANTHONY

Last NameCROUCH

Credit Score10

Loan Amount3500

Requested

Loan Decision

Complete

Cancel

KOFAX

Online Banking

XYZ Bank - Personal Loan Application

1. Personal details – main applicant

TitleMr☒Mrs☐Miss☐Ms☐Other☐

SurnameCROUCH

First name(s)ANTHONY

GenderMale☒Female☐

Address 190BELLELANE

Address 2

Zip code92602

#LA*

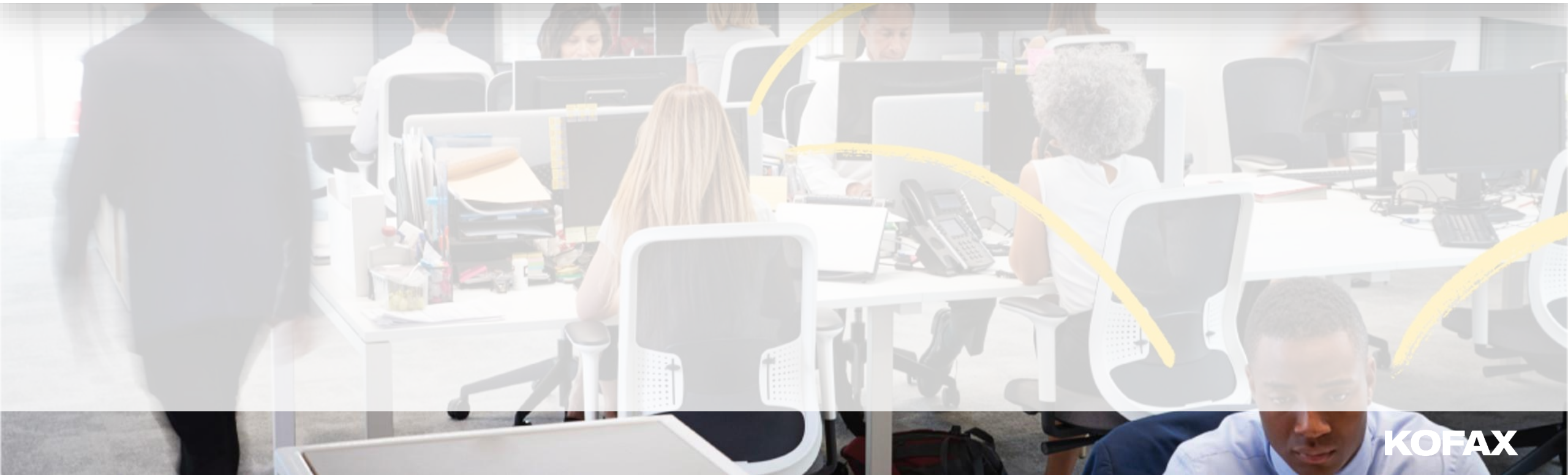
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Self Learning – Customize Logon Form

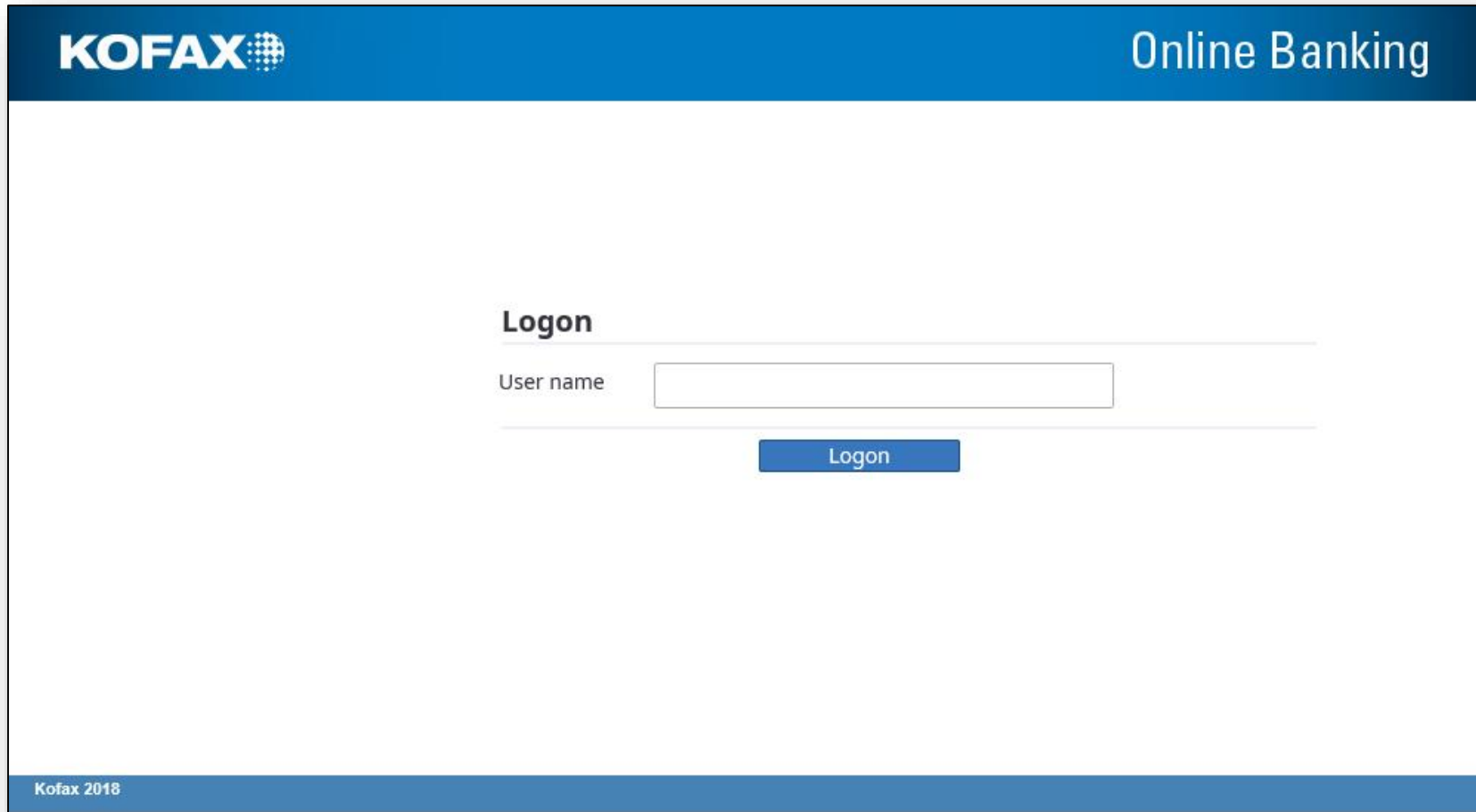


Customize Login Form



- Customise Logon form
 - Columns, Rows, and Cells (layout a form)
 - Add Image
 - Margins
 - Form will shrink (collapse) if no controls are present in a row
- Create or apply a theme
 - CSS or Windows Preset
- Header form
 - WorkspaceHeader (out of box form that can be customised)

Completed Logon Form



The screenshot displays the KOFAX Online Banking login interface. At the top, a blue header bar contains the KOFAX logo on the left and the text "Online Banking" on the right. The main content area is white and features a "Logon" heading. Below this heading, there is a "User name" label followed by a text input field. A blue "Logon" button is positioned below the input field. At the bottom left of the page, a small footer reads "Kofax 2018".

KOFAX Online Banking

Logon

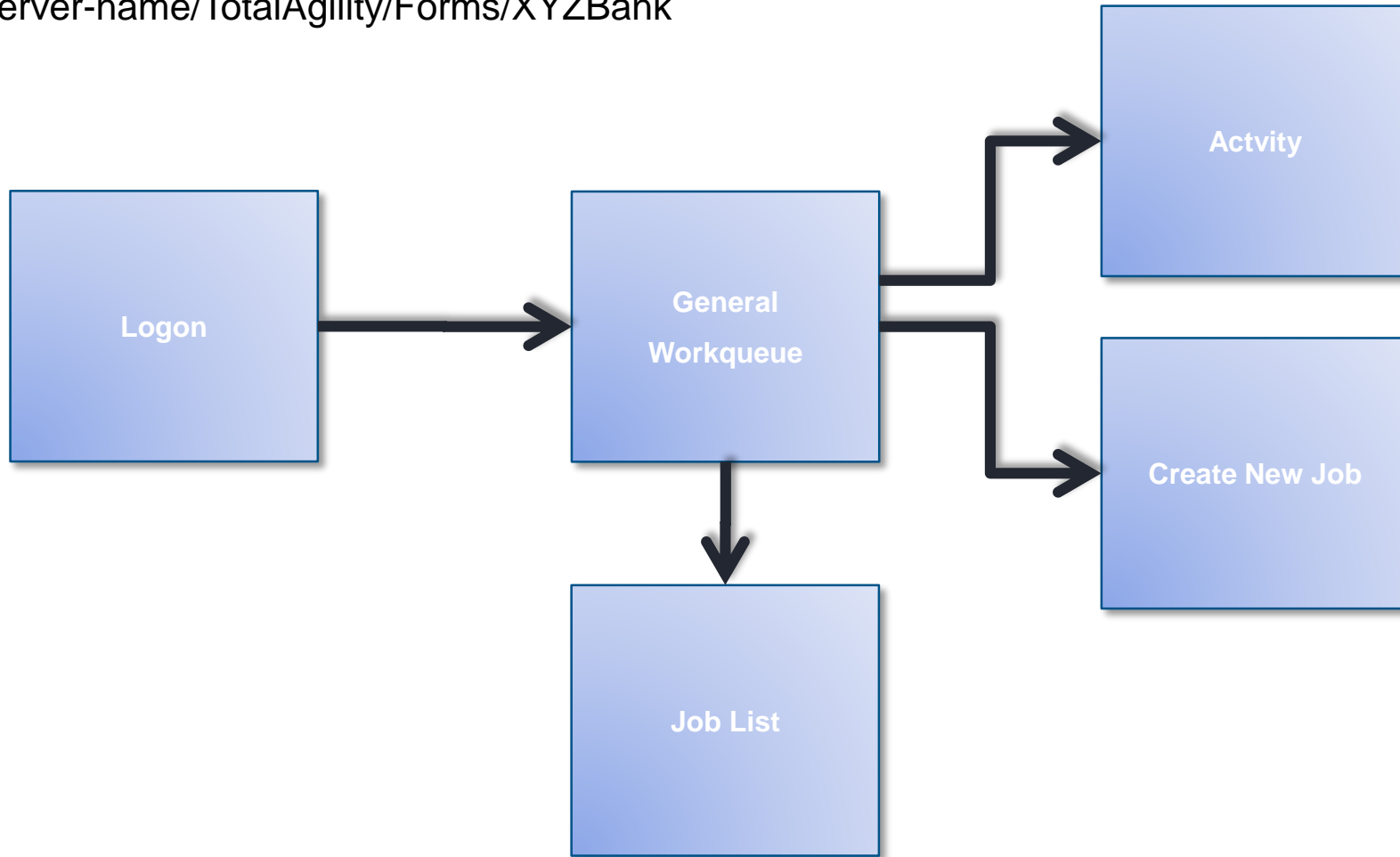
User name

Logon

Kofax 2018

Site Navigation and Security

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



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

Redirect Configuration

- You can 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:
 - Any action that takes the user away from the current form (e.g. redirect action, menu)
 - Closing the browser tab/window
 - Typing into the integrated browser search bar
 - Typing a URL into the browser address bar
 - Using the browsers Back/Forward buttons

Redirect Configuration

- **Ignore redirect confirmation** property can be set to Checked/Unchecked for:
 - Form
 - Redirect action

> **Form - la_loanapproval**

Controls

Control width (%) 100 [Update](#)

Associated label width 200

Background

Color ☒ Theme ☐ Inline

Use image ☐

Behaviour

Use browser tab order ☒

Expand last row to fit ☐

Enable column splitting ☐

Show column splitter ☐

Redirect confirmation ☒

New action *

General * indicates a required field

Associations

Type* Redirect

Name* rdNewLoanApplication

Description

Do you want this action to support different behavior for different languages?

Multilingual ☐

Redirect to Form

Target* LA_CreateNewLoanApplication ×

Display in Same window

Ignore redirect confirmation ☒