

## TECHNICAL TRAINING LAB INSTRUCTIONS

In this lab you will learn how to configure other “Capture Sources” or input methods to the Capture Applications process. In this lab we will look at how to configure a Multi-Functional Peripheral (MFP) device to initiate a TotalAgility process.

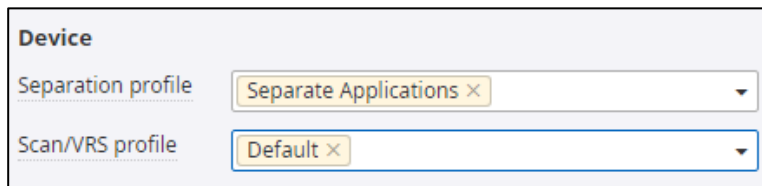
## Lab 18-1

### Configure an MFP Device as a Capture Input Source

*Configure a Device Separation Profile and Scan/VRS Profile*

In this part, you will assign a Separation Profile and/or Scan/VRS Profile to your device. This must be configured in the process properties.

1. From the **Main** menu navigate to **Workflow > Business processes**, and the **Capture Applications** process.
2. From the **Properties** panel, select the **Capture** tab.
3. From the **Device Separation Profile** dropdown, select **Separate Applications**.
4. From the **Device Scan/VRS profiles** dropdown, select **Default**.



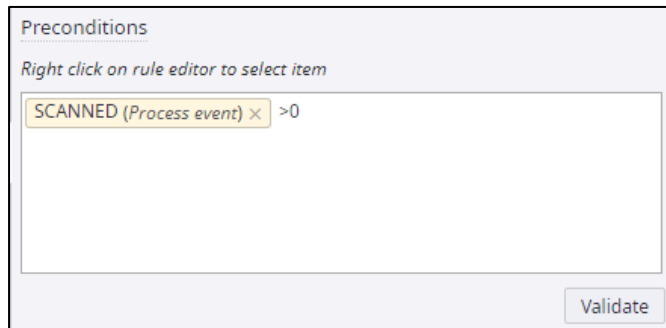
The screenshot shows a configuration panel for a device. It has a title bar labeled "Device". Below the title bar, there are two dropdown menus. The first dropdown is labeled "Separation profile" and has "Separate Applications" selected. The second dropdown is labeled "Scan/VRS profile" and has "Default" selected. Both dropdowns have a small 'x' icon in the top right corner of the selection box.

*Add a Precondition*

MFP devices work slightly differently than scanners. You must set a precondition on the first activity in your process to wait until all the images have been scanned by the MFP device. A special event called Scanned is added to a process when it is set to be Initialized from scan. The initial count of this event is 0. Once all images have been uploaded an event is raised to the process to allow it to continue.

5. Select the **Classification** activity, and from the **Properties** panel, select the **Dependants** tab.
6. Right click in the **Preconditions** rule editor and from the **Process event** tab, select **SCANNED**.

7. Type **>0** after the event name.



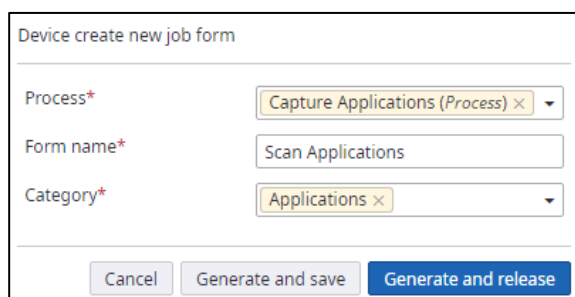
The screenshot shows a 'Preconditions' dialog box. At the top, it says 'Right click on rule editor to select item'. Below this, there is a text input field containing 'SCANNED (Process event) x' followed by '>0'. At the bottom right of the dialog is a 'Validate' button.

8. **Release** and **Close and unlock** the process.  
**Note:** This event and pre-condition will now prevent the job from moving into classification until the MFP has completed its scanning.

#### *Build a Device Create New Job Form*

In this part, you will build a Device create new job form for the Capture Applications process. In this example, the form will be displayed on mobile and MFP devices.

9. From the **Main** menu navigate to **User interface > Forms**
10. From the **Generate** dropdown, select **Device create new job form**.
11. Set the following options:



The screenshot shows a 'Device create new job form' dialog box. It has three main fields: 'Process\*' with a dropdown menu showing 'Capture Applications (Process) x', 'Form name\*' with a text input field containing 'Scan Applications', and 'Category\*' with a dropdown menu showing 'Applications x'. At the bottom, there are three buttons: 'Cancel', 'Generate and save', and 'Generate and release'.

**Note:** The *Title* of the form is displayed on the MFP device. The *Name* of the form is displayed on a mobile device. After generation, both the form name and form title will be the same. You can change the form name and/or title by opening the form and modifying the appropriate property.

12. Click **Generate and release**.

## Lab 18-2

### Managing Devices

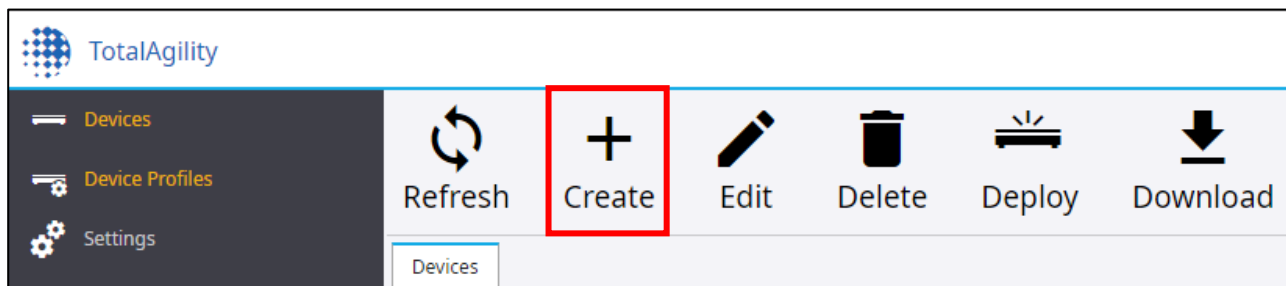
The device manager displays a list of connected devices e.g. Mobile phones, MFP devices etc. The device manager can discover devices on the same network so you can add devices to Kofax TotalAgility. These devices can connect with Kofax TotalAgility and be added and self-registered.

**Note:** The device manager cannot discover devices that are on different subnets or outside a firewall.

1. From the **Main** menu navigate to **System > System settings**, and from the **Capture** card, click **Devices**.

**Note:** The Admin screen of the Device Manager opens in a new tab.

2. From the **Devices** menu, click **Create**.



3. From the **Windows Start** menu select **Windows PowerShell**, run the **ipconfig /all** command. Enter the information displayed into the fields under the **General** tab.

```

Windows PowerShell
PS C:\Users\Trainee> ipconfig /all

Windows IP Configuration

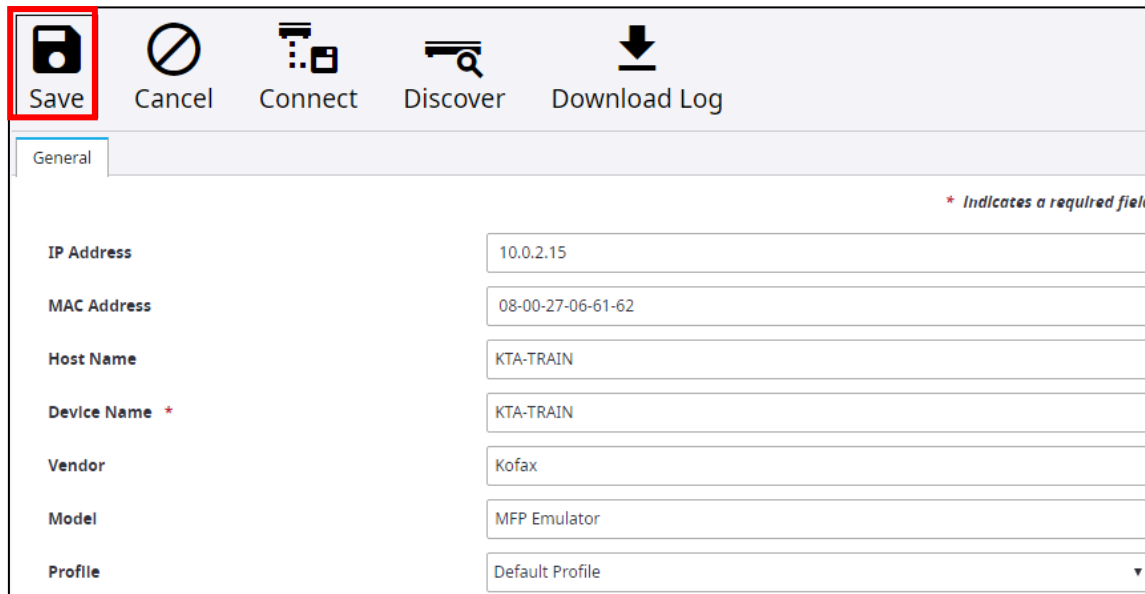
Host Name . . . . . : KTA-TRAIN
Primary Dns Suffix . . . . . :
Node Type . . . . . : Hybrid
IP Routing Enabled. . . . . : No
WINS Proxy Enabled. . . . . : No
DNS Suffix Search List. . . . . : home

Ethernet adapter Ethernet:

Connection-specific DNS Suffix . : home
Description . . . . . : Intel(R) PRO/1000 MT Desktop Adapter
Physical Address. . . . . : 08-00-27-06-61-62
DHCP Enabled. . . . . : Yes
Autoconfiguration Enabled . . . . : Yes
Link-local IPv6 Address . . . . . : fe80::7c89:94b:ae6b:e6f8%2(Preferred)
IPv4 Address. . . . . : 10.0.2.15(Preferred)

```

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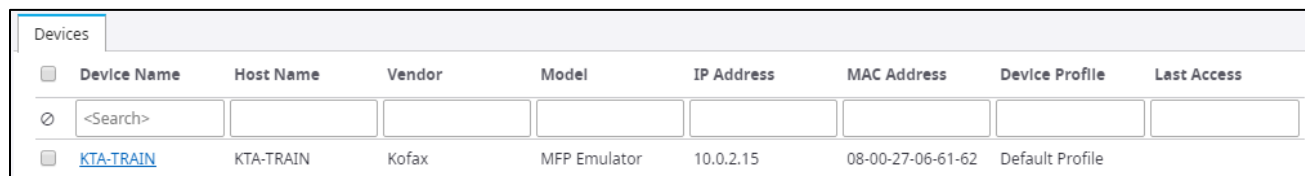


The screenshot shows the 'General' tab of a device configuration window. At the top, there is a toolbar with five icons: 'Save' (highlighted with a red box), 'Cancel', 'Connect', 'Discover', and 'Download Log'. Below the toolbar, the 'General' tab is active, displaying a form with the following fields:

- IP Address: 10.0.2.15
- MAC Address: 08-00-27-06-61-62
- Host Name: KTA-TRAIN
- Device Name \*: KTA-TRAIN
- Vendor: Kofax
- Model: MFP Emulator
- Profile: Default Profile (dropdown menu)

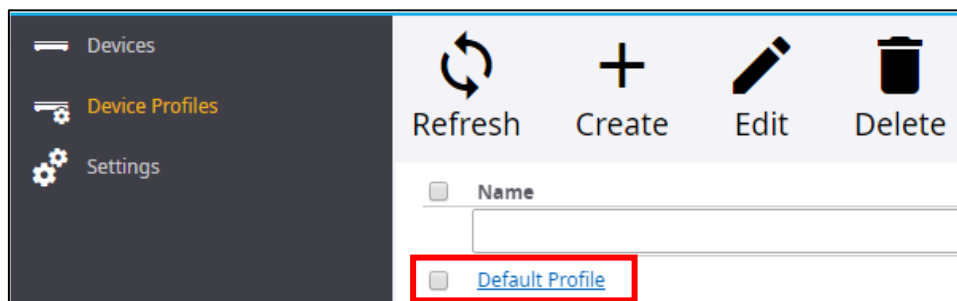
A red asterisk next to 'Device Name' indicates it is a required field. A note at the top right states: '\* Indicates a required field'.

- Click the **Save** icon, and the device will be added.



Device Name	Host Name	Vendor	Model	IP Address	MAC Address	Device Profile	Last Access
<Search>							
<a href="#">KTA-TRAIN</a>	KTA-TRAIN	Kofax	MFP Emulator	10.0.2.15	08-00-27-06-61-62	Default Profile	

- Click on the **Device Profiles** menu and open the **Default Profile**.



The screenshot shows the 'Device Profiles' menu on the left side of the interface. The menu items are 'Devices', 'Device Profiles' (highlighted), and 'Settings'. On the right, there is a toolbar with four icons: 'Refresh', 'Create', 'Edit', and 'Delete'. Below the toolbar, there is a list of device profiles. The 'Default Profile' is highlighted with a red box.

- From the **General** tab, make sure **Logon** is set to **Allow Login**.

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**General** Associated Devices Associated Forms Custom Metadata Fields

*\* Indicates a required field*

**Name \*** Default Profile

**Description** Default Profile

**Logon** Allow Login

☒ **Default**

**Auto Logout Time (Fujitsu only) \*** 300

7. Select the **Associated Devices** tab and you should see the machine name displayed in the **Associated** panel.

General **Associated Devices** Associated Forms Custom Metadata Fields

Available:

Associated: KTA-TRAIN

8. Select the **Associated Forms** tab, select the **Scan Applications** form in the **Available** panel, and click on the > button, to move the form to the **Associated** panel.

General Associated Devices **Associated Forms** Custom Metadata Fields

Available:

Associated: Scan Applications

9. Click on the **Save** icon to save the Default Profile settings.
10. Click on the **Settings** menu. Uncheck the checkbox next to **Require Authentication for Device Registration**.

**General** Advanced

*\* Indicates a required field*

☒ **Enable MFP Self-Registration**

☐ **Require Authentication for Device Registration**

☐ **Disable MFP Single-Sign-On without password**

☐ **Display Confirmation Messages**

**Scan History Retention Period \*** 30

**Scan History Display Limit \*** 20

**API Key \*** 6083a55f-7281-4aa2-9c96-58ce6aecdbea

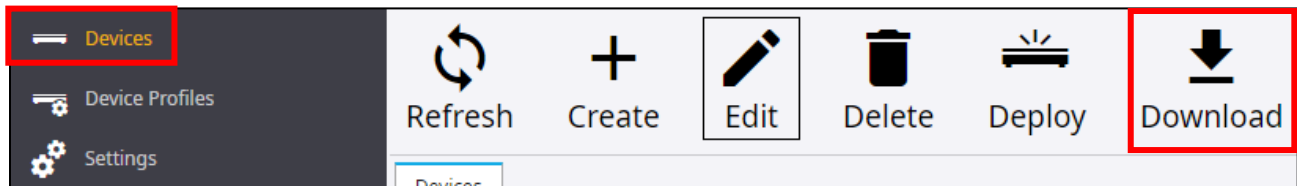
11. Click the **Save** icon and click **OK**.

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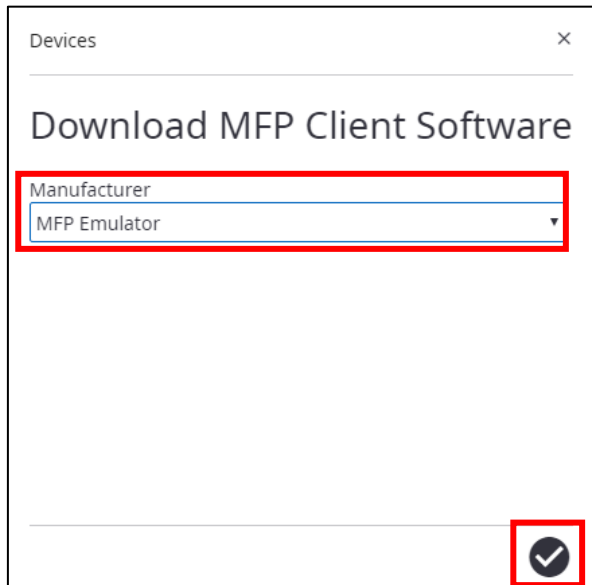
### Activating and Testing the MFP Emulator

Kofax TotalAgility provides a Windows-based application that can be used to demonstrate MFP clients without requiring a physical device to be present. In the following steps, you will connect to the MFP Emulator and capture documents.

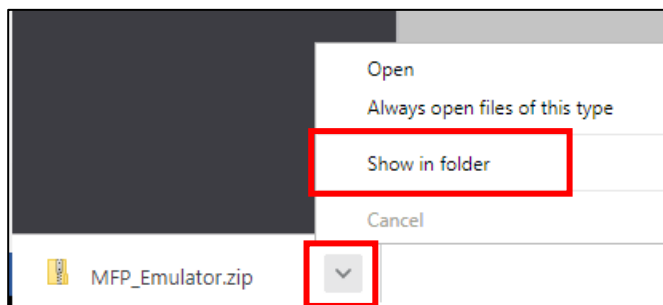
12. From the **Devices** menu, click the **Download** icon.



13. From the **Manufacturer** drop-down select **MFP Emulator**. Click on the checkmark icon to start the download.



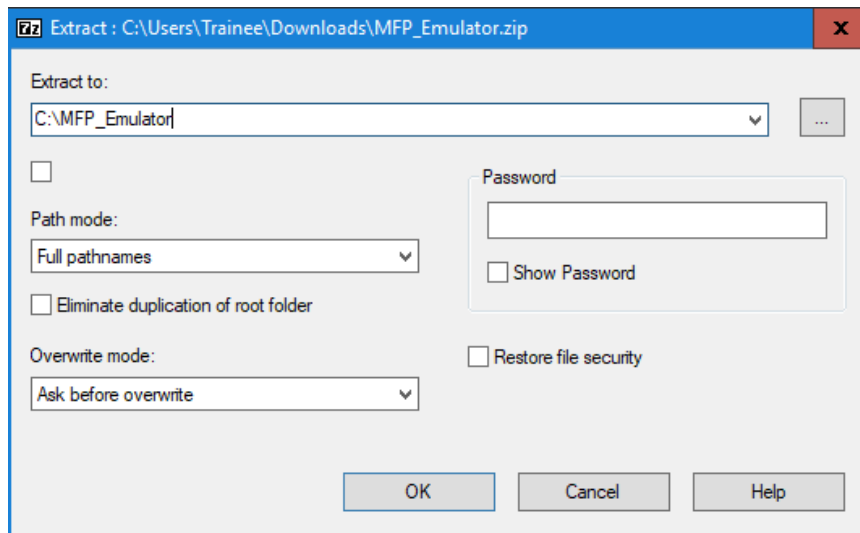
14. A zip file will be generated for the **MFP Emulator**.
15. In the **Chrome** downloads area (bottom left corner of the browser) click the **Up** arrow beside the file MFP\_Emulator.zip, and select **Show in folder**.



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16. Right click the **MFP\_Emulator.zip** file and select **7-Zip > Extract files...**

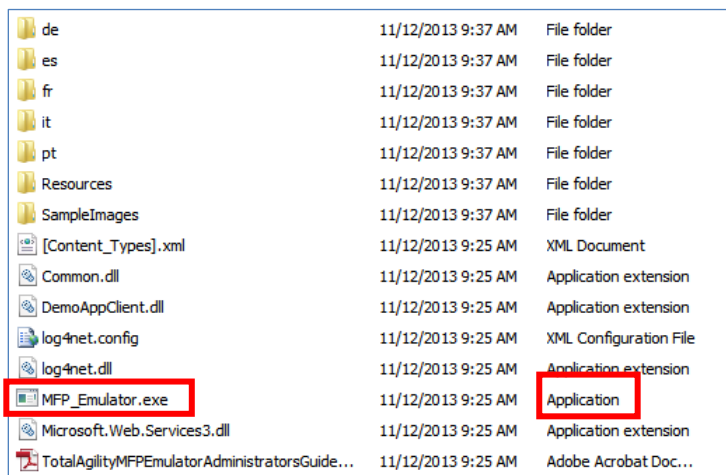
17. Specify the following path:



18. Click **OK**.

19. After the files have been extracted, open **C:\MFP\_Emulator**.

20. Double-click on the **MFP\_Emulator.exe** file to run the application.



21. After the **MFP Emulator** opens, a **Settings** window will display. Fill in the fields accordingly.

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Settings

Server

Name or IP: kta-train

Path: TotalAgility

Protocol: ☐ HTTP ☒ HTTPS

Port: 443

Language

Language: English

Accessibility

Display text instead of animation: ☐

OK Reset Cancel

**Note:** For the Name or IP field, enter your machine's host name. Also note that HTTPS is used in the screenshot.

22. Click the **OK** button to save the settings. The application connects to your server.
23. Click the **Log On** button, and enter the following logon credentials:

Log On

Log on with your user account.

User Name Trainee

Password .....

OK Cancel

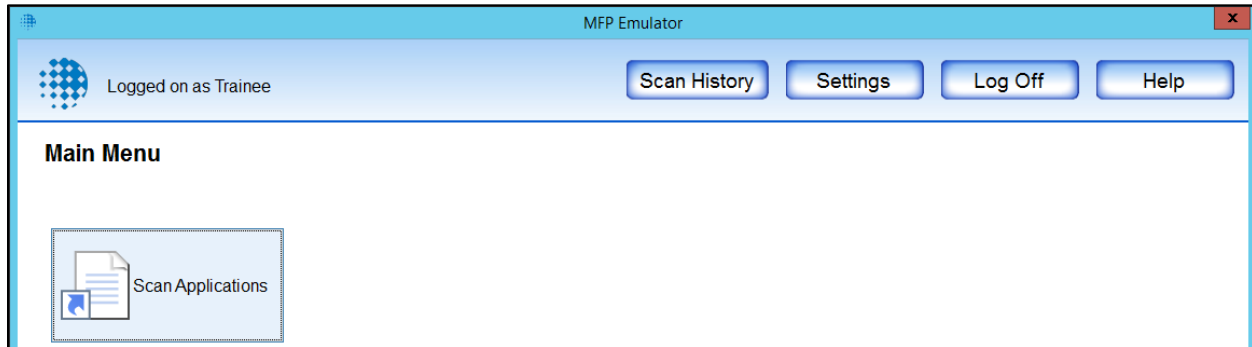
**Note:** The password is WOrkstation! The Trainee is the installer account. This account is automatically added to the Device Users group. You may need to add your own account to the Device Users group in the Resources module.

24. Click **OK**.



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25. A shortcut link to the **Scan Applications** form is displayed. Note that this shortcut icon can be modified with an image of your choice (on a real MFP device).



26. Click on the **Scan Applications** form shortcut. You will be presented with the **Folder Fields**. Enter **Paul Black** for the **Scan Operator** field, today's date in the **Scan Date** field (mm/dd/yyyy), and a **Location**.  
**Note:** If TotalAgility is installed on a server using UK Date format, please enter dd/mm/yyyy.

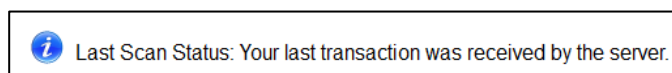
27. Click the **Scan** button at the bottom of the window.
28. You will be presented with the File Open dialog from which you can select a document.
29. **Browse** to C:\KTAEssentials\LabFiles\Documents\Test Set, select a document and click **Open**.
30. After a brief moment -- simulating a scan operation -- the captured image is displayed in the MFP Emulator screen where you can view the image and respond to various options such

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as: delete the image, cancel the operation, start a new job, scan more pages, or send and exit.

31. Click the **Send and Exit** button.

32. The document is sent to Kofax TotalAgility, and a job created. Ensure the status says: *Your last transaction was received by the server* before completing the next step.



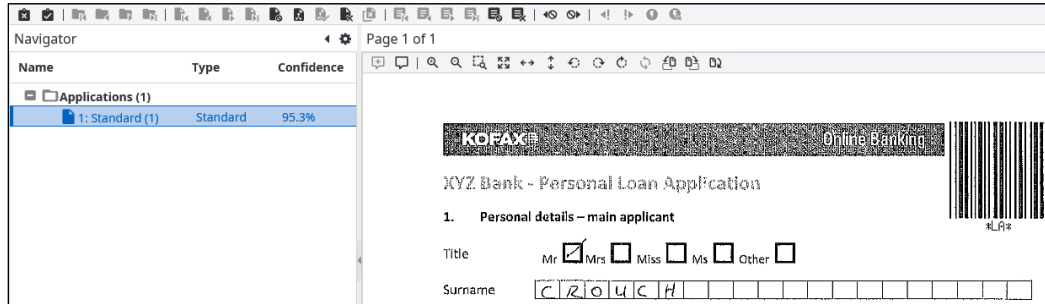
33. Now that scanning is complete, click on **Log Off**, and then click on **Exit**, closing the MFP Emulator.

34. Open the **xyzbank** workspace and login as **pblack**.

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

36. The **Document Review** activity should be pending. Click on the link to open it.

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37. **Complete** the activity and then clear down the job.

*Remove Precondition*

As the job will always be awaiting events, you will remove the precondition on the classification activity now that you have tested the MFP Emulator.

38. Navigate to the **Designer**.

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

40. Select the **Classification** activity, and from the **Properties** panel, select the **Dependents** tab.

41. **Delete** the **Precondition** in the rule editor.

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

## **Lab Notes**

### *Events and Preconditions*

1. If you have multiple capture channels for the same process, you may wish to put a decision or branching rules at the beginning of the process to test the capture source, and carry out the appropriate logic for that method of capture.

### *Other MFP Form Types*

2. Note that you can build other MFP form types e.g. Blank form (no implied functionality), Scan Activity, and Work Queue. You can also configure individual process activities to be MFP Ready.

### *MFP Starter Pack*

3. If you are interested in learning more about MFP devices, processes, and forms, you can import an MFP Starter Pack. This can be found in:  
C:\Program Files\TotalAgility\Sample Processes\MFP Starter Pack\MFP Starter Pack Package.zip  
**Note:** Sample images can also be found in this location. A getting started guide can be found by locating the Kofax TotalAgility Documentation on the customer portal: MFP Starter Package Getting Started Guide.

### *Changing the Image Displayed on an MFP Device*

4. You can change the image that is displayed on an MFP for the Device create new job form. Open the form, go to the Properties of the form select an image.

**Revision Questions**

1. The MFP \_\_\_\_\_ can be used to demonstrate MFP functionality when you are not connected to an MFP device?
2. Which form type could you build if you are looking to create an instance of a process using a mobile or MFP device?  
\_\_\_\_\_
3. Why do you need to add a precondition to the first activity in a process when you are uploading documents using an MFP device?  
\_\_\_\_\_  
\_\_\_\_\_
4. Can you change the image (for a form) that is displayed on an MFP device?  
\_\_\_\_\_
5. Where can you register MFP devices?  
\_\_\_\_\_