

Sites, Forms, and Navigation

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KOFAX

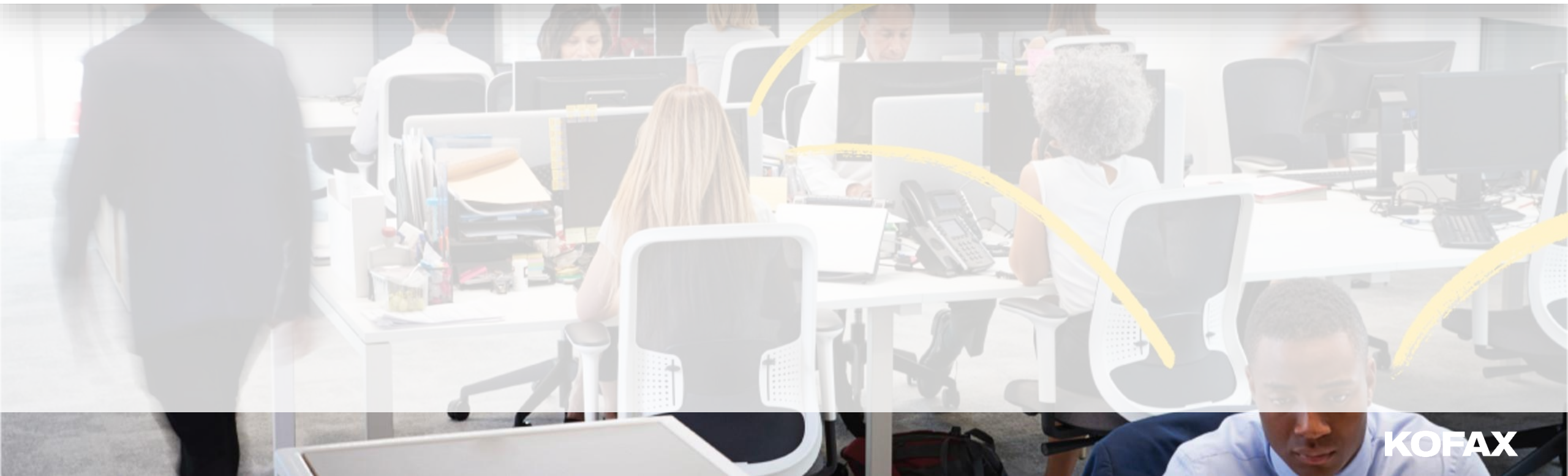
Create Forms and Navigation for the Loan Application Process

- In this lab we will:
 - Generate a Create new job (CNJ) form for the Loan Application process
 - Build Activity forms for all Ordinary Activities in the Loan Application process
 - Modify the WorkspaceMenu to allow users to access the new Create new job form
 - Add security to allow ONLY the Admin team access to the menu



Please note that all slides in Module 07 are relevant to this module – Sites, Forms and Navigation

Additional Slides



What is the Forms Designer?



- The **Forms Designer** allows you to:
 - Build a web front end to allow scanning, classification review, validation and verification
 - Create a site
 - 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?

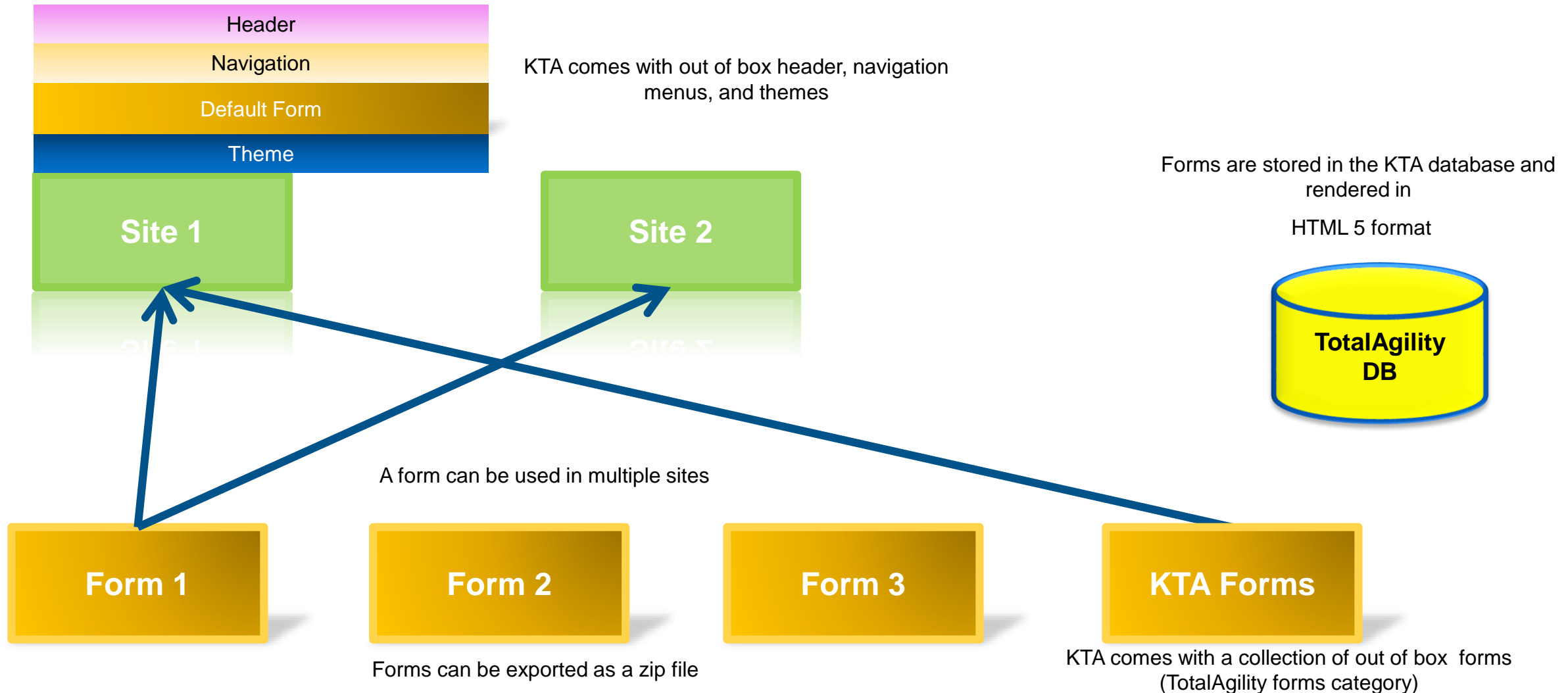


- **Benefits** of the Forms Designer include:
 - A user-friendly point-and-click forms design tool
 - Initially it can be used to rapidly prototype your business solution
 - Reduces development and deployment time
 - Less coding and technical / IT staff involvement
 - Uses industry standard HTML 5 and JavaScript
 - Cross browser compliance

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://localhost/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



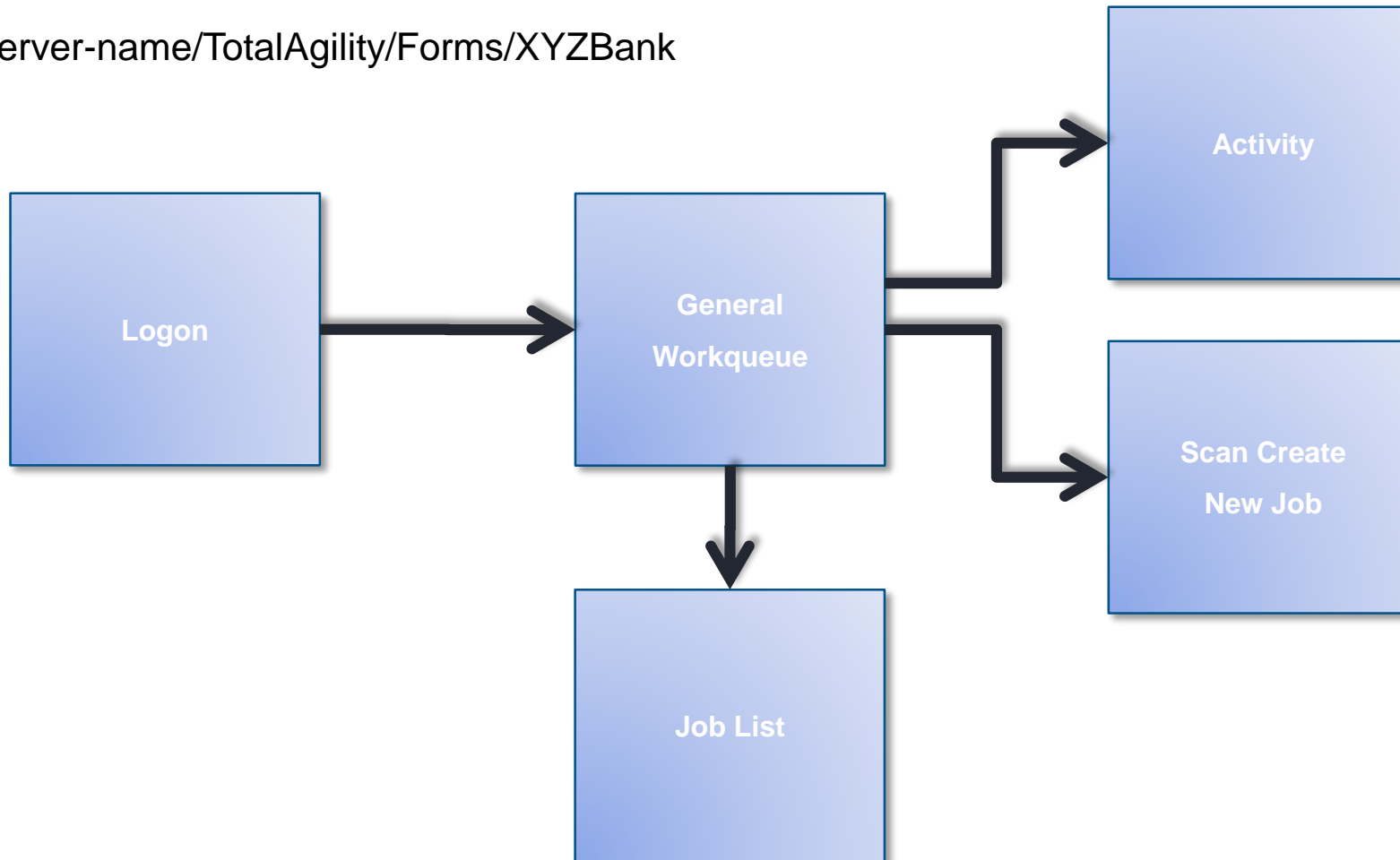
Generating Forms



- **Generate Forms**
 - Create new job
 - Activity
- **Form Layout**
 - Width mode is Percentage by default i.e. will take up the full screen size
 - Use Rows/Columns/Cells to position controls (textbox, calendar, buttons) on the form

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)

Site Navigation and Security

- Create a new blank menu or add menu items to the out of box **WorkSpaceMenu** menu
- Apply a menu to a form
 - Horizontal and Vertical
 - None
- 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