

Kofax TotalAgility

Features Guide

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The KOFAX logo is displayed in a bold, blue, sans-serif font. The letters are thick and closely spaced, with a consistent weight throughout the word.

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Preface

This guide provides an overview of the Kofax TotalAgility features.

Introduction to TotalAgility

TotalAgility is a Smart Process Application (SPA) platform that transforms and simplifies critical business interactions. Use TotalAgility to design, develop, and deploy continually improving business processes that result in better customer engagement, more effective process execution, and increased business agility.

TotalAgility provides multichannel information capture, business process management and adaptive case management and mobile capabilities in a single, integrated product offering.

TotalAgility supports Business Intelligence (BI) and Analytics, advanced data integration and e-signature capabilities through prebuilt integration to the Kofax Insight, RPA, Kofax SignDoc and Kofax Communication Manager products, respectively.

On-Premise Multi-Tenancy

The On-Premise Multi-Tenant version of TotalAgility, which allows Shared Service Centers (SSCs) and Business Process Outsourcers (BPOs) to offer the software/solutions to their customer base (tenants), includes the following:

- Tenant management system (to create and manage tenants)
- Live (production) environment
- Development environment

By leveraging the optional On-Premise Multi-Tenant version of TotalAgility, you can deploy a single instance of the software that serves all tenants, such that each tenant has its own set of data that remains isolated from data that belongs to all other tenants.

Kofax Analytics for TotalAgility

Kofax Analytics for TotalAgility is an extension of TotalAgility that tracks data as it moves through the workflow to produce Business Intelligence (BI) dashboards. The dashboards help you track data through the workflow; analyze the effectiveness of the processes and resources in real-time; and address business problems.

Data stored within the database displays in standard or custom views that consist of charts, grids, pivot tables, and reports. You can also extract information from the User Tracking tables in your TotalAgility installation and from external databases.

Related documentation

The full documentation set for Kofax TotalAgility is available at the following location.

<https://docshield.kofax.com/Portal/Products/KTA/7.7.0-o3xtk9orwd/KTA.htm>

In addition to this guide, the documentation set includes the following items:

- *Kofax TotalAgility Prerequisites Guide*: Provides system requirements for installing TotalAgility, instructions for running the prerequisite utility, and a software checklist for various installation types.
- *Kofax TotalAgility Installation Guide*: Describes how to install and configure TotalAgility.
- *Kofax TotalAgility Integration Server Installation Guide*: Describes how to install Kofax Integration Server and integrate it with other products.
- *Kofax TotalAgility On-Premise Multi-Tenancy Installation Guide*: Describes how to install and configure On- Premise Multi-Tenant system.
- *Kofax TotalAgility Configuration Utility Guide*: Explains how to use the Configuration Utility to update settings across various configuration files for different types of installation and deployment.
- *Kofax TotalAgility Administrator's Guide*: Provides information to the administrator on configuring and maintaining a TotalAgility installation.
- *Kofax TotalAgility Architecture Guide*: Provides an overview of the TotalAgility architecture, covering various deployments for on-premise, on-premise multi-tenancy and Azure environments.
- *Kofax TotalAgility Best Practices Guide*: Describes the best practices you must follow when using TotalAgility to improve performance, cost, maintenance, availability and security.
- *Kofax TotalAgility Migration Guide*: Provides information on TotalAgility upgrades from different versions and post upgrade configuration.
- *Kofax TotalAgility Help*: Provides details about using TotalAgility to design business jobs and cases, assign resources, create forms, integrate with external applications, and more. Access the help from the TotalAgility application by clicking the Help button.
- *Kofax TotalAgility Workspace Help*: Describes how to use the Workspace to manage activities, jobs, and resources. Access the help from the TotalAgility Workspace by clicking the Help button.
- *Kofax TotalAgility On-Premise Multi-Tenant System Help*: Describes how to create and manage tenants using the TotalAgility On-Premise Multi-Tenant system.
- *Kofax TotalAgility Web Capture Control Help* : Provides details on using a Web Capture control in creating multi-page documents, creating a new document in a new folder, deleting pages that have been incorrectly scanned, and more; also, describes the buttons available in a Web Capture control toolbar.
- *Kofax Analytics for TotalAgility Product Features Guide*: Provides an overview of the dashboards that help you track data through the workflow, analyze the effectiveness of the processes and resources, and address business problems.
- *Kofax TotalAgility Tables*: Describes the TotalAgility tables and fields used by Kofax Analytics for TotalAgility.
- *Migration From Kofax Products Guide*: Provides information about migrating TotalAgility files and Kofax Transformation Modules projects to TotalAgility.

Training

Kofax offers both classroom and computer-based training that will help you make the most of your Kofax TotalAgility solution. Visit the Kofax website at www.kofax.com for complete details about the available training options and schedules.

Getting help with Kofax products

The [Kofax Knowledge Base](#) repository contains articles that are updated on a regular basis to keep you informed about Kofax products. We encourage you to use the Knowledge Base to obtain answers to your product questions.

To access the Kofax Knowledge Base, go to the [Kofax website](#) and select **Support** on the home page.

Note The Kofax Knowledge Base is optimized for use with Google Chrome, Mozilla Firefox or Microsoft Edge.

The Kofax Knowledge Base provides:

- Powerful search capabilities to help you quickly locate the information you need.
Type your search terms or phrase into the **Search** box, and then click the search icon.
- Product information, configuration details and documentation, including release news.
Scroll through the Kofax Knowledge Base home page to locate a product family. Then click a product family name to view a list of related articles. Please note that some product families require a valid Kofax Portal login to view related articles.
- Access to the Kofax Customer Portal (for eligible customers).
Click the **Customer Support** link at the top of the page, and then click **Log in to the Customer Portal**.
- Access to the Kofax Partner Portal (for eligible partners).
Click the **Partner Support** link at the top of the page, and then click **Log in to the Partner Portal**.
- Access to Kofax support commitments, lifecycle policies, electronic fulfillment details, and self-service tools.
Scroll to the **General Support** section, click **Support Details**, and then select the appropriate tab.

Chapter 1

Imaging

Using TotalAgility, you can drastically reduce your organization's labor-intensive processes by capturing all types of content for automatic classification, extraction, validation and delivery into applications, processes and repositories.

You can capture information at any point in business process and without human intervention, extract, separate, classify, validate and perfect information. For example, after the loan application process starts, a financial institution may request documents, such as Proof of Income and Credit Reports. The information can be captured anytime from any source, including from mobile or tablet devices, and ingested into the loan approval process.

You can classify documents; define scanner or device settings for reuse; and separate and automatically place documents in folders during capture.

You can export images (or both images and text that has been automatically extracted from the images) to a PDF or other file format, define resolution and quality and more. You can identify text and graphics, convert to HTML and XML file formats, and ensure interpretation by assistive software for the visually impaired.

TotalAgility provides a number of capture nodes that can be used as part of process flow definition. Nodes include Scan, Extraction, Classification and Image Processing. Use of these nodes in a process provides an efficient and effective means to manage the capture of inbound documents and information (see [Capture activities](#)).

These nodes help you:

- Scan a single document or a collection of documents.
- Classify documents into specific folders based on document types.
- Extract and store data from the documents.
- Validate, verify and review documents and folders in a process.
- Process images that are imported and images that are scanned from an MFP.
- Export documents and folders to "System of Records", using an export connector. The System of Records could be a database, IBM/FileNet, EMC/Documentation, SharePoint, and so on.
- Transfer documents or folders between two linked TotalAgility servers

Further, TotalAgility can automatically initiate (or restart or awaken from a wait state) a process to which an inbound document is required. A property, Initialize from Scan, enables this automatic process initiation, for example initiating an instance of the "loan approval" process when a loan application document is received.

Further information on capture features is available in various sections of this Features guide.

Chapter 2

Transformation

Transformation is a technology used to transform data into information. The transformation features act upon raw data and transform it into meaningful information. Transformation of a document includes steps, such as Optical Character Recognition (OCR), Classification, Separation, Extraction, Formatting and Validation.

Kofax TotalAgility Transformation features include advanced tools and utilities to configure, test and benchmark these steps.

Document sets

The Transformation Designer supports document sets to allow handling large groups of documents for training, testing and benchmarking capture functionality.

Classification

Kofax TotalAgility offers classification based on layout, content and rules. Classification is learn-by-example, meaning that sample images are provided to represent individual document types. The software learns to tell classes apart by analyzing these samples. Rules-based classification can be used to augment the learn-by-example classification.

Trainable Document Separation

Trainable Document Separation (TDS) is a classification-based separation technology that examines each page in a document and assigns several classification result options. The page classification results are compared to other surrounding pages and evaluated to determine the most logical way of separating the pages into smaller documents. Like classification, TDS is learn-by-example; all it needs for configuration are sample documents that are correctly separated.

Clustering

The ability to organize documents based on their content is available in Transformation Designer using Clustering. A set of unknown documents is processed, and based on the content or layout, the Clustering feature organizes the documents into groups. Several iterations of clustering are performed, and interaction is required throughout each step of the process. The Clustering feature learns from the

changes and improves the clustering results throughout the process. The result of this process is a set of known documents organized in a hierarchy with the relevant class names. This hierarchy can be used by the project for classification and separation training, benchmarking, and testing.

Extraction from unstructured documents

A learn-by-example locator is available to extract data from documents that have no consistent layout. Use the locator to extract data from unique contracts, correspondence, architectural drawings, or even essays and manuscripts. Any type of data can be extracted, such as numeric and non-numeric data, or even an unknown format extraction works best on natural language text.

Extraction from invoices

Several locators, some of which are learn-by-example, can be used to extract from invoices. Header data, line items and amounts are supported. Line item matching using a purchase order database is possible, as well as line item extraction without a Purchase Order (PO) reference.

Extraction from forms

Special locators for forms allow quick setup of zones on multi-page forms. Background (the pre-printed zones and labels) is automatically removed to allow Optical Character Recognition (OCR) or Intelligent Character Recognition (ICR) get the best possible input. Zones are automatically registered to allow for typical shift, stretch and skew on scanned images.

Extraction – check processing

A2iA technology for handwriting recognition and document management is supported for extracting data from checks.

Database extraction

Using a database table in a fuzzy manner is a powerful tool to extract known data, such as the database record representing the vendor sending an invoice, or the customer sending a letter. You can use this easy-to-configure technology to identify document senders.

Extraction - other

Additional locators allow configuration of extraction for almost any need, including highly customized scripting.

Optical Character Recognition (OCR)

Advanced OCR capabilities are offered in Kofax TotalAgility. OCR serves as a basis for classification and extraction. OCR full text can also be stored to allow indexing and searching documents in repositories. Full page ICR is available and powered by A2iA. Extraction of bar codes is also supported. The following bar codes are supported:

- Codabar
- Code 128
- Code 39
- Code 93
- EAN 8
- EAN 13
- IATA 2 of 5
- Interleaved 2 of 5
- UPC-A
- UPC-E
- Postnet
- Check Code 39
- Check Interleaved 2 of 5
- Check Codabar
- PDF417
- Micro PDF417
- Aztec
- DataMatrix
- QR Code
- Micro QR Code

More than 170 languages are supported for OCR.

Kofax Search and Matching Server (KSMS)

This standalone 64-bit server uses multiple CPUs to quickly perform a fuzzy search within a database. Use KSMS to extract data from documents or look up data entered by an operator.

Chapter 3

Case and business process modeling

TotalAgility lets you create, view, edit and delete processes, cases, case fragments, business rules, simulations templates and skins. You can also manage supporting artifacts, such as variables, milestones, states and resources, and manage translations. You can import and export processes, work allocation rules and languages.

Business Process Modeling Notation (BPMN)

TotalAgility uses BPMN for process design.

BPMN positions itself as a bridge between process modeling and process implementation. BPMN is readily understandable by both technical developers and business users. It provides a graphical notation that is intuitive to business users yet able to represent complex process semantics.

Start node

A Start node indicates the beginning of a process path.

When you create a new map, a Start node is added by default. You can change the name of the Start node.

You can use standard BPMN event types to denote that something happens at the beginning (Start node) of a process.

Event types for a start node

Event types for the start node indicate the circumstances that trigger the start of the process. They are just visual aids; they do not trigger events or perform any functions.

To set the event types for a Start node, select the Start node and on the **Event type** list select the event type to set.

The following table describes the event types available for a Start node and the corresponding BPMN Standard notations.

Event Type	BPMN standard notation	Description
Default		Indicates the default notation.
None		Indicates that no trigger is defined.

Event Type	BPMN standard notation	Description
Message		Indicates that the receipt of a message, such as a request from a customer, initiates the process.
Timer		Indicates that the process starts at a specific date and time or a recurring time, such as every Monday at 9 AM.
Conditional		Indicates that a business condition, such as a balance dropping below a certain value triggers the process.
Signal		Indicates that an external signal, such as the addition of a new customer, triggers the process.
Multiple		Indicates that any event can start the process.
Parallel Multiple		Indicates that the process has multiple events, and all the events must occur for the process to start.

Activity

An activity is an individual step (service) within a business process, such as getting customer details.

An activity in a process map may have various uses, such as:

- A call to a script that runs automatically or requires feedback from a user, such as a form to be filled.
- A call to a third-party software component to automatically send email.
- An ordinary activity that facilitates the passing of output and input variables to other parts of the business process.

See [Add an activity](#).

Annotation

Use annotations to add extra information to a process or an activity in a process.

This information is then readily available to the user implementing the TotalAgility site.

You can position an annotation anywhere in a process map, and directly attach it to an activity or a node.

Note Annotations placed anywhere on the map are saved in that position.

See [Add an annotation](#).

Attachment

Use attachments to link additional information to a process or activities within a process.

For example, for a Procurement process, attach process-related documents, such as an exceptions list, terms and conditions, or an example invoice form.

An attachment can be a Word document, Excel spreadsheet or a PowerPoint presentation. Once an attachment is added to a map, it is available to all users who open that map and select to view the attachment.

Note The position of the attachments is retained upon saving a map.

See [Add an attachment](#).

End node

An End node indicates the end of a process path or the completion of the job.

Use an End node to complete a process, or a particular stage of a process that cannot progress any further.

In line with BPMN, an End node can indicate how the job or paths are completing, that is, Escalation, Error, Message and more.

A process can have multiple end nodes, when of a type which completes the job all other parallel paths are stopped.

See also:

- [Add an end node](#)
- [Event types for an end node](#)

Process paths

Define process paths using decisions and branching rules.

Decision

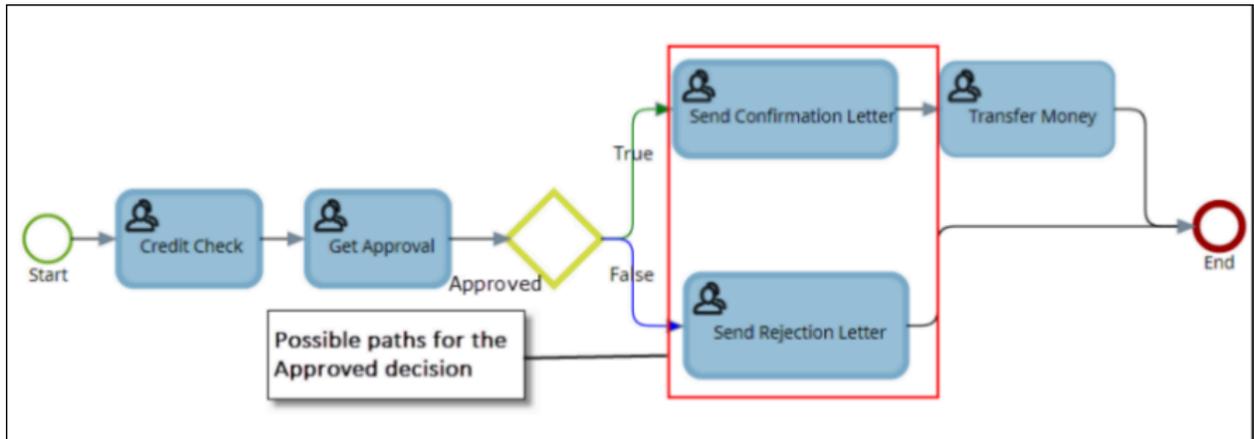
A decision is a point in a process to select the path the business process must follow. The selected path depends on the evaluation of one or more conditions (decision rules).

By default, a Decision node includes:

- One Condition: Condition on which the rule is evaluated.
- True Path: The path of execution when the decision evaluates to true.
- False Path: The path of execution when the decision evaluates to false.

At runtime, the value of the decision variable is passed as an operand/keyword into the process map and may be evaluated against another variable or value.

For example, in the Loan Approval map, the Send Confirmation Letter and Send Rejection Letter are two possible paths for the Approved decision. If the APPROVED condition evaluates to TRUE, the Send Confirmation Letter activity takes place at which point the confirmation letter is sent to the customer, and the money is transferred to the customer's credit account. Otherwise, the Send Rejection Letter activity takes place, at which point the rejection letter is sent to the customer.



See [Add and configure a decision](#).

Branching rules

Branching rules help you model more complex business logic. They are simpler and neater than using numerous decision nodes. Unlike decisions, they are not limited to a maximum of only two mutually exclusive paths.

- Use a decision to model an exclusive choice decision pattern where only one of the two alternative paths is required for the process to continue.
- Use a branching rule to model a multiple choice decision pattern where the flow is "split" into two or more alternative paths.

A branching rule must include the following:

- A condition (business rule) for each path (destination node) that must be met before the destination node can become pending or active. The business rule set for destination nodes determines which destination node is activated. Any of the target destination nodes can potentially be activated, if each business rule evaluates to True; two or more outcomes can be valid.
- A default node to execute at runtime if none of the conditions is met; this stops the process flow from stalling.

Note If you do not specify business rules on the output paths, then all paths are executed normally.

Branching can be either OR (inclusive) or XOR (exclusive):

- **OR branching:** Allows one or more, or all of the outgoing paths to be taken. The paths are determined by conditions and if none of the conditions is met, the default path is taken.
- **XOR branching:** Allows only one path to be taken, thus restricting the flow. If multiple true paths exist, the first path is taken based on the alphabetical order of the activity name. If no true paths are determined, the default path is taken. If the conditions of more than one path are satisfied, the first found path becomes active, and others are ignored. XOR is applicable for all process maps.

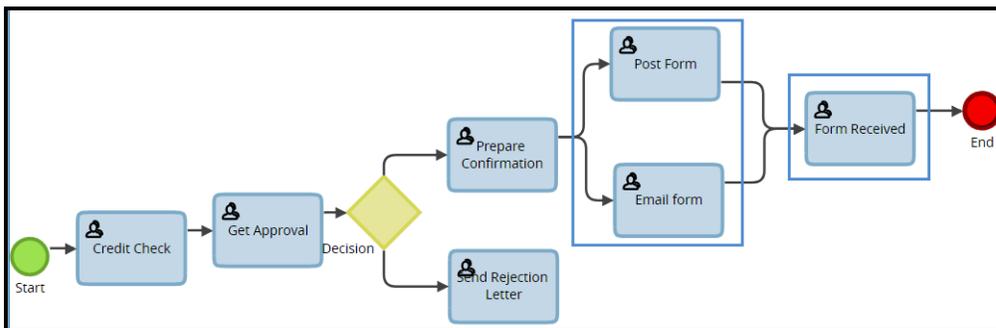
See [Configure branching rules](#).

Dependents

Dependents are nodes (activities and decisions) on which an activity depends for completion.

A node may have multiple paths (parallel paths) flowing from, resulting in more than one activity becoming pending when the originating node has completed.

Set dependents if parallel nodes, such as activities must complete before the current activity can become pending. See the following example of the Loan Approval process.



Post Form and Email Form activities are the possible dependents. Forms Received is the activity for which dependents are set.

Note You cannot set dependents if there is only one path going into the activity and decision.

See [Add dependents](#).

Preconditions

A precondition is a rule that must be met before an activity can become pending (manual activities) or progress (automatic activities).

A precondition is the last step to be evaluated before the node becomes pending; dependents and others are determined first. An activity with a precondition is a "waiting" activity.

For example, in the Loan Application process, set a precondition on the Transfer Money activity (for transferring a loan amount into the applicant's account) to allow the activity to become pending only after the Signed_Loan_Agreement event is raised and recorded.

Once the signed agreement is scanned into a third-party Document Management System, this event precondition is met and the Transfer Money task can become pending. In this scenario, you would use relevant API methods to let TotalAgility know that an external event has fired.

Important When a precondition is set for an activity, the activity goes into an AwaitingEvents status. This is similar to the Pending status except that the activity does not appear on anyone's work queue and no activity notification is sent. Everything else is done based on the activity becoming pending. For example, milestones are updated if set up.

Preconditions can be defined using process events or a document set. Preconditions can be satisfied by raising internal or external events, or once the rules pertaining to the document set have evaluated. Once the precondition is satisfied, the activity automatically moves on.

Creating preconditions for a process event is slightly more complicated than normal decision conditions because it combines both variables and events (which may have the same name).

A precondition is only available for activities; they are not available for decisions or embedded maps.

During the lifetime of a job you can reevaluate preconditions to reevaluate any activities in a job that are in an Awaiting Events status. For example, you may reevaluate a precondition when you have manually changed the precondition value after a job has started, and you need all activities in a job reevaluated against the new precondition value.

See [Add preconditions](#).

Loop

Some activities are always available, such as the Contact Customer in a Loan Application process. You can add a loop for such activities. Select the activity and drag from the center of the activity to make a loop. The activity gets looped to itself.

Manage process maps

Use the information in this section to manage maps.

Orientation

You can change the direction of a map layout from vertical to horizontal and vice versa as appropriate for your process or target audience. The process is redrawn accordingly.

Rearrange process

The "Rearrange process" feature automatically redraws your process map in an easy-to-read manner.

Lines

Lines assist with the layout of your process.

Snap to grid

The "Snap to grid" feature automatically aligns an activity to the nearest grid.

Auto placement

The "Auto placement" feature automatically places the activity to the nearest grid horizontally and in accordance with the current activity. Activities added to decisions are placed above or below the decision. When the Auto Placement option is turned off, you can drag the activity to the required location.

Zoom

The pan and zoom functionality can help you navigate process maps effectively. You can easily zoom in and out of large process maps.

Undo/redo

You can undo/redo changes within a process using the Undo # or Redo # buttons on the Action bar. You can undo/redo a maximum of 30 updates, such as typing or design changes. The undo/redo list is cleared when an update is made on any area outside the Design tab.

Variables

A variable is a storage location for values that are retrieved at runtime. Variables are used to store and transport data from one activity to another, and are integral to the setup and creation of a business process. Variables are also used to determine paths of execution.

You can create variables at both server and process level.

Use process variables to store data for a specific process. Process variables hold values for items that change during the execution of a process. They are local (private) to the map for which they are created. Process (and case) variables can be simple (1 value) or complex (an array of values).

TotalAgility supports a number of variables such as, Bool, Currency, Date, Float, Long, Checklist, Complex and dynamic complex, String, and others.

Process variable examples

Variable Name	Type	Value
CUSTNAME	String	JuliaR
CUSTADDRESS	String	Hollywood
AMOUNT	Double	100000
Approved	Boolean	True

Initialization variables

The System requires initial information for a process to run. For example, to process a loan application, customer details and the loan amount are required. An initialization variable is any process variable whose value should be provided when the job is being created. In case of Loan application process, you could create process variables such as customer ID, customer name and loan amount, and then declare the loan amount as the initialization variable.

The order of the initialization variables is configurable within the designer.

See also:

- [Variable types](#)
- [Create process variables](#)
- [Manage process variables](#)

Variable types

TotalAgility supports variables of type Bool, Byte, Currency, Date, Decimal, Double, Float, Long, Short, String, Text, Nullable date, Nullable string, and XML.

TotalAgility also supports the following type of variables.

Checklist

A checklist variable is a process variable used to hold checklist information for quality checking and sampling. A single checklist variable can contain several checklist items.

See [Create a checklist variable](#).

Complex

Use a complex variable to hold tabular or array-based data values, such as a list of product details. Two kinds of complex variables are available:

Static complex

Static complex variables are an array (group) of variables of potentially different data types. Static complex variables keep their cell mappings to process variables throughout the job. Every time a mapped variable value is updated in the job, it is reflected in the static complex variable cell.

Note A static complex variable can only be created for a process; it cannot be created as a server variable.

See [Create a complex variable](#).

Dynamic complex

See [Dynamic complex variable](#).

Data backbone

A Data backbone variable is a variable that maps directly to a project within a selected KCM (Kofax Communications Manager) server and gives access to the data backbone belonging to that project to get or set data in it. Each KCM project consists of one data backbone. The data backbone exposes all the data required to create documents in that project.

A data backbone is an XML structure containing field sets with single fields and nested/repeating data. For example:

```
[Company Details]
Company Name
Address
  Street
```

```
Postcode
Country
Code
Name
[Director Details]
<List of Directors>
  Director Name
  Director Address
    <List of prior addresses>
```

Only single fields can be used directly within a process. Custom code is required to set the more complex and repeating data.

You can expand the variable to see the fields. When a field is mapped, the level from where it came, is also displayed. For example, if you use the Country Name from the preceding example, then the syntax is: <VariableName>.Address.Country.Name.

You can set the data field by field (single fields only) or use a service call to populate the entire structure. For example, you can populate the variable by getting data from a database, or you can pass the value of a field into a business rule and update a different field using the result.

Within KCM, you can add new fields to the data backbone, but cannot delete existing fields. You must refresh the project in KCM integration to view the newly added fields.

You can create multiple variables of this type, each pointing to the same or different projects.

See [Create a data backbone variable](#).

Document

Use a Document variable where one document type is required, such as submitting a proof of address later in the bank application process. Using a Document variable, one instance of a document is added to the repository typically of a known type.

Use Document variables to use document instances in a TotalAgility process or business rule.

Use a document variable as a process initialization variable or as an activity input or output variable. You can also use document fields directly as input or output parameters to an activity.

When you create a job on a process that uses a document variable, the runtime instance ID of the document is stored in the document variable.

See [Create a document variable](#).

Dynamic complex

Dynamic complex variables keep their cell mappings to process variables only until they are updated in the job. They are stored against the job and their array size and values can change during the course of the job.

At design time, you can create a complex variable with a maximum of 1000 cells, such as 1000 X 1, 500 X 2, or 5 X 200. However, at runtime, no maximum limit is placed on the number of cells.

Dynamic complex variable can also be created as a server variable. Both types of variables are created in the same way. However, the Process Initialization option is not available when setting up complex server variables.

Variable members can be either dynamic or static. A static value is one that a user can enter but cannot modify.

See [Create a dynamic complex variable](#).

Folder

Use a Folder variable where multiple document types are required, for example, bank application where multiple document types are required to process an application. Using a Folder variable more than one document is added to the repository typically of different types. Use Folder variables to use folder instances in a TotalAgility process or business rule.

Use Folder variables to use folder instances in a TotalAgility process or business rule.

When you create a job on a process that uses a folder variable, the runtime instance ID of the folder is stored in the folder variable.

You can use a folder variable as a process initialization variable or activity input or output variable. You can also use folder fields directly as input or output parameters to an activity.

See [Create a folder variable](#).

JSON expression

Use a JSON expression variable to retrieve required data from the JSON string.

To retrieve data, give any JSON string and retrieve the JSON values as per Expression text(JSON path). For processing JSON, JSON path is required, similar to XPath for XML.

JsonPath uses special notation to represent nodes and their connections to adjacent nodes in a JsonPath path. There are two styles of notation, namely dot (\$.name) and bracket (\$['name'] or [name]). The dollar sign (\$) represents root member object.

See [Create a JSON expression variable](#).

System

These are simple non-editable process variables that give you information, such as who created the job and, the job ID which you typically do not know at design time.

Each System variable holds a value for a specific TotalAgility task. For example, SPP_RES_JOB_Creator holds the User ID of the creator of a job, or the AWF_JOBID holds the ID of the job. This information is only gathered upon job creation.

See [Add a system variable to a process](#).

XML

Use an XML variable to use all or part of the XML document.

To use a part of the document, you must create an XML expression to identify the required section of the document.

XML documents can be represented as tree view nodes, and the XML Path Language (XPath) describes a path through the XML document to select elements that match the path.

Note The XPath is the expression type of the XML expression variable. For example, to select the first number element of the XML document, the XPath is: `"/number"` or to select all the book nodes under the bookstore element, the XPath is: `xmlDoc.selectNodes("/bookstore/book")`

- An XML expression created at the server level can be shared between business process maps, where the same XML is used but for different purposes.
- An XML expression created at the process level can only be used with the process map for which it is created, and the XML expression is local to that process map.

See [Create an XML variable](#).

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- An XML expression created at the process level can only be used with the process map for which it is created, and the XML expression is local to that process map.

See [Create an XML expression variable](#).

Activity types

TotalAgility supports both manual and automatic activities.

A manual activity is not capture-related, and it is expected to be performed by a person. Data can be passed to and returned from a manual activity. The resources required to perform the activity can be configured and range from a static resource (administrator) to dynamically driven variables that are populated based on rules.

The activities in TotalAgility belong to the following categories:

- [Common](#)

- [Capture](#)
- [Kofax](#)
- [Microsoft](#)
- [CMIS](#)
- [Micro Focus](#)
- [Script](#)
- [Document set](#)
- [Other](#)

You can configure C# scripts, VB .NET scripts, Expressions, .NET assemblies, or .NET Form actions, which when run into TotalAgility on a multi-tenant environment, allow or restrict certain actions, such as accessing data from different tenants such as reading memory, file system or database.

For example, if you execute a .NET/C#/VB.NET activity that contains malicious or other script that tries to access the file system, the activity fails and the job is suspended. Similarly, if you execute a .NET form action that contains malicious or other script that tries to access the file system, the action fails and returns an error.

To allow these scenarios to execute, you must first configure the Safe Scripting option in the configuration file. For Safe Scripting configuration, refer to the *Kofax TotalAgility On-Premise Multi-Tenancy Installation Guide*.

Common activities

Common activities include both manual as well as automatic activities.

Automatic	Manual
Embedded process	<p>Ordinary activity</p> <p>When you add an activity to a process map, it is an Ordinary activity by default. You can change the type of the activity and configure the activity as needed.</p> <p>See Change an activity type.</p>
.NET	
Web service	
Create new job	
Create subjob	
Data access	
Synchronization	
Loop	
Expression	
Business rule	
Email	

Ordinary activity

An ordinary activity is a manual activity that facilitates the passing of output and input variables to other parts of the business process.

Embedded process activity

Embedded process activity permits you to add process within another process by adding activities and attributes (variables, roles, states, milestones) to the parent map.

Use embedded processes to create logical group of activities and if you need to add attributes to a running job rather than perform a discreet operation in the case of a subjob.

Note A subjob cannot be searched or viewed independently from the parent job.

An embedded process activity is useful in scenarios, such as:

- Initial process map is too large.
- A process may be reused in other maps.
- A process may be reused by another department or company.

You can embed smaller process maps into the main map (parent map). The standard processing rules for an embedded process map are similar to other process maps.

The activities in an embedded process may need to use or modify variable values in the parent. If you embed a process map you must declare the same variable names in the embedded process (child) as the parent. All variables created in the parent or child map are visible to the entire job.

Note

- You cannot assign resources to a process map once it is embedded in the parent map.
- You can include a synchronous embedded process within an asynchronous map. But you cannot include an asynchronous embedded process in a synchronous map.
- If a parent map is synchronous, the synchronous embedded process is performed synchronously.
- If a parent map is asynchronous, any synchronous or asynchronous embedded processes are performed asynchronously.

See also:

- [Configure an embedded process](#)
- [Common activities](#)

.Net activity

A .Net activity permits you to configure a call to a .Net assembly to perform some custom operation typically used for integration, data manipulation and so on. TotalAgility interrogates the assembly to show the available classes exposed by the assembly.

On selection of the class, the methods and their parameter lists are displayed. You can map data to and from the .Net call back into variables defined within the process.

.Net assemblies can be added independently of the maps and held either as a reference to a location on disk or placed within the TotalAgility store.

See also:

- [Configure a .Net activity](#)
- [Common activities](#)

Web service activity

A Web service activity permits you to configure a call to a web service (SOAP or SOAP WCF).

A web service is typically used for integration, data manipulation and the rest, performed by services that reside on a remote server.

Web services come along with a Web Service Definition Language (WSDL). The WSDL describes all the metadata of a web service, such as methods and parameters. TotalAgility uses the WSDL to generate a client proxy that allows you to select classes and methods in the Web service activity.

TotalAgility interrogates the service and shows the available classes exposed by the service. On selection of the class, the methods and their parameter lists are displayed. You can map data to and from the service call back into variables defined within the process.

Web services can be added independently of the process maps in which they are consumed.

To use a Web service activity, you must first set up a web service reference.

See also:

- [Create a Web service reference](#)
- [Configure a Web service activity](#)
- [Common activities](#)

Create new job activity

The automatic Create new job activity creates a new job that can run independently of the job that created it.

You can create a job of type case, job or associated job and map data from the existing job into the new job. A Create new job activity is typically used to span a job that will run parallel to the parent job (cross-selling opportunity) with potentially no inter-job communication (although it can be achieved if desired).

For example, in a Homeowner Insurance process, after you capture all customer details, through the main Homeowner Insurance process, you can add a Create new job activity into the main process to spawn a completely separate process called Selling Car Insurance. Although you will pass customer details into the Create new job activity, it is an independent process.

Note You must ensure that any required initialization parameters are added to the map that is used to create a new job.

See also:

- [Configure a Create new job activity](#)
- [Common activities](#)

Create subjob activity

A subjob is an entirely self-contained process, which can be invoked by the parent process.

A Subjob activity is typically used when processes have been decomposed for reusability and readability purposes. For example, in a Banking process, the main purpose of a Credit Check subjob is to complete a credit check and return a customer's credit rating. The main process is unaffected by the implementation of the subjob, as long as the credit rating result is relayed back to the main process so a bank clerk can continue to process the loan application. The Credit Check subjob could potentially be reused in a number of key business processes, such as loan applications, credit card applications, and mortgage loans.

Note This activity is not supported in a Business rule.

The difference between a Subjob and Create new job activities is that the path in the parent launching the job waits until the subjob returns, thus permitting data to not only be passed to the subjob, but also returned from it.

The difference between a Subjob activity and an embedded process is that none of the variables, milestones and the rest of the subjob are added to, or inherited from the parent.

With a subjob activity, outputs can be mapped even if the specified process map from which to create a subjob is not synchronous.

By applying workflow rules, you can create one or more subjobs within a business process. When workflow rules are used, a subjob is created for each resource allocated to the Subjob activity. See [Add a Create subjob activity with advanced workflow rules](#).

Only a single subjob is created when workflow rules are not being used. The Subjob activity does not display on the work queue of any resource.

Important

1. Before creating a Subjob activity, create the subjob map. See [Design a basic process](#).
2. Add variables to the subjob map to hold information passed from the main map.
3. Assign these variables as initialization variables. See [Create process variables](#).

Note

- You can include a synchronous create subjob process within an asynchronous map. But you cannot include an asynchronous create subjob process in a synchronous map.
- If the parent map is synchronous, the synchronous create subjob process is performed synchronously.
- If the parent map is asynchronous, the synchronous or asynchronous create subjob process is performed asynchronously.

See also:

- [Configure a Create subjob activity](#)

- [Add a Create subjob activity with advanced workflow rules](#)

Data access activity

Use a Data access (DAS) activity to permit the process to interact with a database.

You can access tables, views and stored procedures, construct queries within the Designer, and map data from the process onto the query.

A DAS activity is typically used for direct integration with a third-party database without the need to write any code.

Using a Data access activity within a process, you can get, add, update, or delete database records.

Important Before using the Data access activity, create a process variable to hold the database connection string (see [Create process variables](#).) A database connection string helps you connect with the required relational database. The string contains details about how to connect to the selected database, such as a data source, the user ID and the login password.

For example, create a process variable, with the following settings:

- ID = DBConnectionString
- Type = String
- Value = DSN=TotalAgility

Note

- The connection string is case sensitive.
- You can whitelist a database connection string. If you clear, Allow all in the System settings, you can only use the whitelisted database connection strings. See [Configure the server URLs and database connection strings](#).

See also:

- [Configure a Data access activity](#)
- [Common activities](#)

Synchronization activity

Use the automatic Synchronization activity to converge and diverge multiple paths of the process, permitting the designer to control the logic of the process.

If merging paths must complete before the synchronization activity can complete, then dependents should be configured.

See also:

- [Dependents](#)
- [Configure a Synchronization activity](#)
- [Common activities](#)

Loop activity

Use a Loop activity to automatically control the extraction of data from an array.

This activity lets you take a row at a time from the array and pass it through your process before looping back to get the next row. For example, to send an email to a list of resources, you would perform a database query to return the list. To process each resource, use the loop node to iterate through each resource on the list or until the end of the data.

See also:

- [Configure a Loop activity](#)
- [Common activities](#)

Expression activity

Expression activity permits you to perform operations on data.

These can be single arithmetic operations, such as add, multiply, subtract, or string manipulation such as Trim, Uppercase, and Date functions such as add months, or get today's date.

For example, you can create an expression to display initials of a name. If the name of a customer is Abc Xyz, and you need to display the initials AX, the rule can be: `Left(FirstName,1) + Left(Surname,1)`

The value from this rule is held in an output (target) variable.

An expression node reduces the amount of custom .NET code or scripting needed by providing the most commonly used functions used for data manipulation.

You can set the value of one or more variables using free text, variables, operators, and functions.

See the following table for the variables supported and not supported by an Expression node.

Supported	Not supported
Bool (Boolean)	Checklist
Byte	Complex
Currency	Dynamic complex
Date	XML
Decimal	XML expression
Double	System variables
Float	
Long	
Nullable date	
Nullable string	
Short	
String	

Supported	Not supported
Entity attributes (simple types)	

See also:

- [Configure an Expression activity](#)
- [Common activities](#)

Business rule activity

Use a Business rule activity to invoke a business rule defined within TotalAgility.

A business rule permits users to simplify complex logic into reusable rules, access to which is provided by this node. When the map is released, any changes to the rule are automatically applied to the process.

See also:

- [Configure a Business rule activity](#)
- [Common activities](#)

Email activity

Use an Email activity to permit the process to send an email.

It can build up the recipients from using resources within TotalAgility or variable text. You can configure subject, attachments and the rest, and dynamically create the body of the email.

By default, a server variable, SPP_SMTP_SERVER with a value of “localhost,” is available in TotalAgility. Change this value, depending on the SMTP server you are using. The value of this server variable can be an SMTP server name or IP address.

Note Once you change the value of the SPP_SMTP_SERVER, restart the TotalAgility core services for the changes to take effect.

You can also specify the port number on which communications with the SMTP server must take place. By default, the port number used by the email node is 30, which you may change as needed. For example, if your port number to send emails is 60, change the server variable to localhost:60.

To send emails to external email addresses, you must have relay permission on SMTP server. Otherwise, you can only send emails to email addresses listed on the SMTP server.

Note By default, the relay permission is not enabled for security reasons. Sometimes the SMTP server, SMTP service or Exchange server are also referred to as Relay servers, as they can relay the mail messages to another mail server.

To send an email, you must configure the email settings for the system.

See also:

- [Configure an Email activity](#)
- [Common activities](#)

Capture activities

The Capture activities include both manual as well as automatic activities.

Automatic	Manual
Document conversion	Scan
Image processing	Document review
Image quality analysis	Validation
Classification	Verification
Extraction	
Composite	
Transfer	
PDF Generation	
Export	
Delete	

Document conversion activity

Use the Document conversion activity to apply all the document conversion / normalization parameters configured in the document conversion profile to any document independent of the source of import.

Note

- Use the Document conversion activity for document conversion and the Image processing activity for eVRS image processing.
- The Document conversion activity supports converting documents (docx, excel, txt and others) to PDF, but does not support converting image files (PNG, JPEG, TIFF and others) to PDF. In such cases, use the PDF generation activity.
- The Document conversion activity supports converting password protected PDF documents to PDF or TIFF or PDF/A, but does not support converting password protected PDF Portfolio and ZIP files.
- The document conversion is supported in synchronous and asynchronous maps.
- If you use Microsoft Office applications for document conversion in the Message Connector, conversion process can only run on one system at a time and the conversions of documents cannot be done in parallel.

See also:

- [Document conversion profiles](#)
- [Configure a Document conversion activity](#)

Image processing activity

Use the automatic Image processing activity to process images that are imported and images that are scanned from an MFP.

If a process has an Image processing activity, it is applied to all documents that the job gets created for, irrespective of the method selected for creating the job (MFP, Web scan, Scan create new job, Upload, Import, Mobile and the rest). For example, if you scan 10 documents or upload them or import them upon job creation, all of them are processed by an Image processing activity if there is one in the job's process.

To process images that are scanned from an MFP, you must add the Image processing activity to the map. If this activity is the first activity in a process that is started by a Device create new job form, you must set the precondition for this activity to `[SCANNED] >0`.

The Image processing activity uses Transformation Server to convert documents and images into TIFF images and apply image enhancement filters. The following formats can be converted:

- BMP
- GIF
- HTML
- JPG
- Microsoft Word in .docx (Word 2007 or later) and .doc (prior to Word 2007) format
- Microsoft Excel in .xlsx and .xls format (versions Excel 97 through Excel 2010)
- PDF
- PNG
- RTF
- TXT

Note We recommend that you use the Image processing activity to process PDF documents so that a TIFF representation is available for actions such as OCR lassoing. For more information, refer to "PDF handling" section in *TotalAgility Best Practices Guide*.

The Image processing activity uses EVRS settings or image enhancement settings and parameters, such as Paper size, Resolution, Color mode in the Scan/VRS profile for normalization. The activity has two tasks: converting documents of all formats to tiff and normalizing all tiffs so that the resulting document is tiff and has the desired size, resolution and color depth.

Advanced EVRS settings take preference over the image enhancement settings. For example, if you select Auto rotate in the Image enhancement settings section, but add an Advanced EVRS settings string that does not enable Auto rotate, the Auto rotate setting is disabled because the presence of the string causes EVRS to ignore the image enhancement setting.

Note The Delete blank page setting is an exception. The EVRS string can only enable Blank page detection, but if you have to delete a blank page, you must select the Delete blank page setting.

Multipage documents and TIFF files are split into separate files for each page.

Document files (Word, Excel, HTML, RTF, and TXT) are identified automatically according to their MIME type. If the MIME type is not set or cannot be recognized, the file is treated as an unknown format. If the

process fails at runtime, the job is suspended and the job note is updated with a message describing the reason for suspension.

The Image processing activity creates a record in Job history or View job in the TotalAgility Workspace at runtime. Where applicable, the text from the source file is saved as OCR data. Multi page documents are stored as document objects, and image files are stored at the page level. The original files are stored with the document source.

Note Expected cost and help text properties are not applicable for Image processing activity.

Important You can increase the Image processing logging by modifying Kofax.CEBPM.ProcessingService.Host.exe.config available at the following location:

```
Kofax\TotalAgility\Transformation Server
```

The default log level is: `<add name="TraceLevelSwitch" value="Warning"/>`

To enable full image processing logging, replace 'Warning' with 'All', This may be useful for troubleshooting.

See also:

- [Configure an Image processing activity](#)
- [Capture activities](#)

Image quality analysis activity

Use the Image quality analysis activity to analyze the quality of an image without the need to process or update the page image.

This activity determines if the image has any issues such as glare, shadow, focus and blur that may impact extraction results. Once the analysis is complete, the information can be used later in your business process.

Note The image quality analysis is only supported on a page level image. To analyze the quality of source level documents such as PDFs, you must convert the documents to individual TIFF images.

TotalAgility only supports the image quality analysis for use with images of small documents such as ID cards or passports, taken with a phone camera device. It does not support image quality analysis for images of larger documents or for non-mobile images.

See [Configure an Image quality analysis activity](#).

Classification activity

Use the automatic Classification activity to classify documents into specific folders based on document types.

You can use this activity in a process to create a record at runtime in the Job History or View Job in TotalAgility. Classification activities include a separation profile property.

This activity is automatically executed at runtime if the Transformation Server is installed on your system. See the *Kofax TotalAgility Installation Guide*.

If the process fails at runtime, the job is suspended and the job note is updated with a message describing the reason for suspension.

See [Configure a Classification activity](#).

Extraction activity

Use the automatic Extraction activity to extract and store data from the documents.

This activity is automatically executed at runtime, if the Transformation Server is installed on your system. See the *Kofax TotalAgility Installation Guide*.

If the process fails when you run this activity, the job is suspended and the job note is updated with a message describing the reason for suspension.

See [Configure an Extraction activity](#).

Composite activity

Use the automatic Composite activity to perform one or more capture actions as a single activity in a process.

Using the Composite activity instead of corresponding standalone activities improves the performance of a process in the Transformation Server.

Note Use standalone activities only in a non-linear process map, or if you need other activities inside a chain of the composed steps.

The Composite activity is automatically executed at runtime if the Transformation Server is installed in your system. See *TotalAgility Installation Guide*.

Add the following actions as a single activity within a Composite activity:

- [Image processing](#)
- [Classification](#)
- [Extraction](#)

You can:

- Add actions in any order.
- Include the same action multiple times.
- Use only a Folder or Document type variable as an input to activity. All actions process the same folder or document.

Note You cannot add the Classification action if you use the Document type variable as input to the activity.

- Apply page renditions to the Image processing action. Page renditions do not apply to extraction and classification activities within the Composite activity.

A Composite capture activity also supports the partial completion property. See [Partial completion](#).

See [Configure a Composite activity](#).

Transfer activity

Use the Transfer activity to transfer documents or folders between two linked TotalAgility servers.

Creating a job on a process and executing the Transfer activity results in the following:

- Moves the document or folder and associated metadata from the current server to the target server and places them at the root of the target server.
- Deletes the document or folder and associated metadata from the source server.
- Transfers all documents and subfolders to the target server if moving a folder.
- Does not decrement the volume count on the target server.
- Does not create the Extraction or Classification groups on the target server. You must import them manually.

When executing the Transfer activity, the transfer fails if:

- The link to the target server was removed.
- The user credentials supplied for the target server are incorrect.
- The folder or document is locked by another user on current server.

If a job fails, restarting the job ignores all items that were moved before the job failed. It will only move the items that were not previously moved.

When importing or exporting a process that uses a Transfer activity, the name of the link between the servers is also exported or imported. If a link with the same name exists on the target server, the Transfer activity uses that link. Otherwise, the target server displays the message "Unknown" in the activity configuration, and the job is suspended.

See [Configure a Transfer activity](#).

PDF generation activity

Use the PDF generation activity to automatically create a PDF from a document or from all documents in a folder.

A PDF generation activity creates a PDF from a document using the settings defined in a PDF generation profile. This is called the generated PDF file. In addition, the activity allows you to configure how certain metadata fields in the generated PDF are populated either from a document field or from a fixed value defined in the configuration of the PDF generation activity. If you chose "Document", the PDF metadata field is populated with the value of a document field. This works only if the document is classified. If the document is not classified, no metadata fields are written, and only a PDF with no metadata field is created.

Note This activity is automatically executed at runtime if the Transformation Server is installed on your system. See the *Kofax TotalAgility Installation Guide*.

See [Configure a PDF generation activity](#).

Export activity

Use the Export activity to automatically export documents and folders to "System of Records", using an export connector.

The System of records could be a database, IBM/FileNet, EMC/Documentation, SharePoint, and so on. You can configure this activity to mark the exported documents as complete.

You need to set up an export connector to export the document types associated with the process map. At runtime, when the export activity is executed, the documents in the process map are exported to the back-end system.

Note

- The on-premise TotalAgility supports the Export activity; TotalAgility in an Azure environment does not.
- You must associate one or more export connectors with the process and document types. See *Kofax TotalAgility Export Connector help*.

See [Configure an Export activity](#).

Delete activity

Use the Delete activity to automatically delete a document or a folder at runtime.

Using this activity, you can mark the deleted documents as complete and define whether to suspend a job if the deletion fails.

Note This activity is automatically executed at runtime if the Transformation Server is installed in your system. See *Kofax TotalAgility Installation Guide*.

See [Configure a Delete activity](#).

Scan activity

Use the Scan activity to scan a single document or a collection of documents.

If multiple scan activities in a process refer to the same document or folder variable, the original version of the extraction group is reused. The version remains the same throughout the lifetime of the job, even if the extraction group is changed after the job is created. This activity type is not supported in a business rule.

See [Configuring a Scan activity](#).

Document review activity

Use the Document review activity to manually review the documents and folders in a process.

This activity type is not supported in a business rule.

See [Configure a Document review activity](#).

Validation activity

Use the manual Validation activity to validate documents and folders within a process.

This activity type is not supported in a business rule.

See [Configure a Validation activity](#).

Verification Activity

Use the manual Verification activity to verify the documents and folders in a process.

This activity type is not supported in a business rule.

See [Configure a Verification activity](#).

Kofax activities

The Kofax activities include the following automatic activities.

- [RPA](#)
- [SignDoc](#)
- [KCM compose](#)
- [KCM distribute](#)
- [KCM pack](#)
- [ControlSuite](#)

KCM compose activity

Use the KCM compose activity to automatically generate and distribute communication documents to the user as part of the process flow.

These documents are based on the templates defined in the Kofax Communication Manager (KCM). The template type can be a document template or a set of templates available within the document pack. You can add additional documents to a document pack if the document pack contains Import slots (as defined in the KCM). These documents become part of the pack and can be reviewed or distributed along with the rest of the contents of the document pack.

The KCM compose activity allows you to compose and distribute documents.

The supported distribution mechanisms are print, email, portal, SignDoc or output management.

Output management allows you to distribute each document pack based on the centralized rules that can be configured in the KCM Rules engine. These rules can be due to legal requirements, corporate policies or customer preference.

For example, if you are sending an insurance policy in Netherlands, and according to the legal requirement the policy needs to be delivered to the customer, then the Portal could be a possible delivery channel for any document pack that contains a policy, and those would have to be delivered through e-mail or print.

Note As the KCM Rules engine is available in KCM 5.1.1, we recommend that you use KCM 5.1.1 if you wish to distribute using output management in TotalAgility.

See [Configure a KCM Compose activity](#).

KCM distribute activity

Use a KCM Distribute activity to distribute documents through print, email, portal, SignDoc or output management at a later date from when the documents were created in KCM.

When distributing the documents using SignDoc, you do not pass in details of the signers as part of the configuration; instead, the signature lines are defined in the KCM template using fields from the backbone. At runtime, the data held in that field (in the backbone) determines the name and email address of the person who needs to perform the signing ceremony.

The output management mechanism allows you to distribute each document pack based on the centralized rules that can be configured in the KCM Rules engine. These rules can be due to legal requirements, corporate policies or customer preference.

For example, if you are sending an insurance policy in Netherlands, and according to the legal requirement the policy needs to be delivered to the customer, then the Portal could be a possible delivery channel for any document pack that contains a policy, and those would have to be delivered through e-mail or print.

Note

- Distribution is not supported for a cloud deployment of KCM.
- As the KCM Rules engine is available in KCM 5.1.1, we recommend that you use KCM 5.1.1 or higher if you wish to distribute using output management in TotalAgility.

See [Configure a KCM Distribute activity](#).

KCM pack activity

Use a KCM Pack activity to extract documents from a KCM pack.

See [Configure a KCM Pack activity](#).

RPA activity

Use an RPA (Robotic Process Automation) activity to choose a robot to be invoked by selecting an appropriate robot from projects within the RPA Server.

Select the appropriate robot and map variables to its inputs and outputs. The RPA robots are used for integration into third-party products.

See [Configure an RPA activity](#).

SignDoc activity

Use the SignDoc activity to define a signing package to get the documents digitally signed.

To define a signing package, you need the SignDoc server to use, the documents to be signed or reviewed and the recipients and their email addresses to sign or review the documents. Additionally, you can specify a name for the signing package.

When a SignDoc server is added to TotalAgility, all the available templates within the selected SignDoc server become available for defining a signing package. When you define a signing package, you can either create a new template or use the existing template from SignDoc. A template consists of documents and signers required for digital signature. Once the signing package is created, SignDoc sends an email to the signer address specified in the configuration along with the link to the documents to be signed. For the signing ceremony, TotalAgility uses the generic names specified for the signer or reviewer during template creation. You can customize the generic names to display names so that the documents are sent with the display name. For example, configure Consultant for Doctor or manager's actual name for Manager. Once the signing ceremony is complete, SignDoc sends a notification to TotalAgility to complete the SignDoc activity.

To execute the SignDoc activity, log on to SignDoc server as Administrator and change the following settings.

Note This is applicable only for SignDoc 2.1 version.

1. Navigate to **SETTINGS > Plugins** .
2. Click **Configuration**.
3. Update **plugin.cfg.KTASStateChangeNotification.kturl** (<http://<KTA server>/TotalAgility>).
4. Update **plugin.cfg.KTASStateChangeNotification.sesionid** (<System_Session ID>).

Note

- All users in the administrator account can access the configured SignDoc details and settings.
- When the SignDoc activity becomes pending at runtime, system sends emails to the addresses specified in the configuration with a link to the documents to be signed. As each user signs their documents in the package, a note is added to the TotalAgility job.
- When the package is created, a note is added to the job with the package ID.
- When the signing ceremony is complete, the signed PDF is updated with signed documents and audit trail details.
- When SignDoc signing package is created and the job is terminated, the document will still exist in the package.
- If the creation of package fails, for example, due to a communication failure with the SignDoc server, a note is added to the job and the job is suspended.
- When SignDoc activity is restarted, existing package is deleted and signers/reviewers need to sign/review again.

See [Configure a SignDoc activity](#).

ControlSuite activity

Use a ControlSuite activity to send documents and document metadata to the ControlSuite server and initiate a new workflow.

See [Configure a ControlSuite activity](#).

Microsoft activities

The Microsoft activities provide the ability to integrate with key Microsoft products, such as SharePoint, Dynamics CRM and Exchange.

This Microsoft activities include the following automatic activities:

- [SharePoint create site](#)
- [SharePoint create folder](#)
- [SharePoint add Item](#)
- [SharePoint delete Item](#)
- [SharePoint uploader](#)
- [SharePoint move Item](#)
- [SharePoint get document](#)
- [Dynamics CRM](#)
- [Exchange server get attachments](#)

Note TotalAgility in an Azure environment does not support the following Microsoft activities:

- Dynamics CRM
- Exchange server get attachments
- All SharePoint activities except the SharePoint add item and SharePoint uploader activities

SharePoint add item activity

Use the SharePoint add item activity to automatically add a document to a SharePoint library, to subfolders in a SharePoint library, or to the root of a SharePoint list.

Lists in SharePoint include communication lists, tracking lists, and custom lists. You can add documents to local and online SharePoint sites as needed.

If a document is checked out, use this activity to check in the document to SharePoint. You can also declare that a document is a record, which adds the document to the record center.

Note The options of checking in a document, declaring a document to be a record, and overwriting documents are only available for a local SharePoint site and not for an online SharePoint site.

Configure TotalAgility to retrieve the item identifier from SharePoint and add the identifier to a variable. When the job finishes, use the information from the variable to identify and select the item you need.

The SharePoint add Item activity differs from a SharePoint uploader activity as described in the table.

SharePoint add item	SharePoint uploader
Uploads a document to any of the following SharePoint locations: <ul style="list-style-type: none"> • Root of a list. • Any library in SharePoint. • Any subfolders available in a SharePoint library; uploads a document only to a document library in SharePoint. 	Uploads a document only to a document library in SharePoint.
Supports item metadata.	Does not support item metadata.

See [Configure a SharePoint add item activity](#).

SharePoint create folder activity

Use the automatic SharePoint create folder activity to create a new folder in a SharePoint integration site.

You can provide a static value or use a TotalAgility variable to specify the folder location and name.

Configure TotalAgility to retrieve the folder identifier from SharePoint and add the identifier to a variable. When the job finishes, use the information from the variable to identify and select the folder you need.

Note The SharePoint Create folder activity is not available in on-premise multi-tenant and Azure environments.

See [Configure a SharePoint create folder activity](#).

SharePoint create site activity

Use the automatic SharePoint Create site activity to create a new site in a SharePoint integration site.

You can define the look and feel of the site using the default SharePoint templates, or the custom templates provided by TotalAgility. The custom templates provided by TotalAgility include a team calendar, contacts list, document folders, job list, work queue and announcements for a document-centric Case site.

In a Case map, if you apply the Kofax Case template for the new SharePoint site, you can access the shared calendar and address book directly from TotalAgility.

While creating a new site, you can allow the default navigation to appear on the site page. The permissions specified for the parent site are automatically applied to the new site.

Note The SharePoint Create site activity is not available in on-premise multi-tenant and Azure environment.

See also:

- [Configure a SharePoint create site activity](#)
- [Microsoft activities](#)

SharePoint delete item activity

Use the automatic SharePoint delete item activity to delete an item or folder from a SharePoint library, SharePoint library subfolder, or the root of a SharePoint list.

The SharePoint lists include communications lists, tracking lists, and custom lists.

If multiple items with the same name exist, all matching items are deleted. Except for the Survey and Discussion Board, you can delete all other items.

Note The SharePoint delete item activity is not available in on-premise multi-tenant and Azure environments.

See [Configure a SharePoint delete item activity](#).

SharePoint get document activity

Use the automatic SharePoint get document activity to copy or check out a document from a SharePoint site to your local computer.

Note The SharePoint get document activity is not available in On-premise multi-tenant and Azure environment.

See [Configure a SharePoint get document activity](#).

SharePoint move item activity

Use the SharePoint move item activity to move an item from one location on a SharePoint site to another on the same site.

You can also update the metadata of a moved document, and declare the document to be a record, which adds the document the Record Center.

Note The SharePoint Move item activity is not available in on-premise multi-tenant and Azure environments.

See [Configure a SharePoint move item activity](#).

SharePoint uploader activity

Use the automatic SharePoint uploader activity to upload a document to a document library in SharePoint. You can upload documents to both local and online SharePoint sites.

Provide a static value or a TotalAgility variable to specify the TotalAgility Web Service and target document URL, and the file path for the source document. You can also specify the content type of the uploaded document. This helps you organize, search and retrieve all documents of a particular content type at runtime.

See [Configure a SharePoint uploader activity](#).

Dynamics CRM activity

Use the Dynamics CRM activity to create a new entity instance, retrieve the required information from an entity instance and update and delete an entity instance for a CRM business unit directly from TotalAgility.

You can assign valid GUID values for CRM lookup and numeric values for picklist fields in a Dynamics CRM activity.

You can assign a Dynamic Complex variable to support retrieval/assignment of values for Party list fields in the Dynamics CRM activity.

For example, an entity instance called Person consists of Name as a string field and Nationality as a picklist field with the following values.

Name	Jack
Nationality	1: Irish 2: American

When you create an entity instance by passing `Name, 1` and retrieve the entity instance details from Dynamics CRM, the following information is retrieved: `Jack, Irish`.

Note The Dynamics CRM activity is only available for TotalAgility on-premise; it not available for Designer running in On-premise multi-tenant and Azure environments.

See also:

- [Create an entity instance in the Microsoft Dynamics CRM](#)
- [Delete an entity instance from Dynamics CRM](#)
- [Retrieve an entity instance details from Dynamics CRM](#)
- [Update an entity instance in Dynamics CRM](#)

Exchange server get attachments activity

Use the Exchange server get attachments activity to automatically retrieve all the files attached to your email and route them to a specific destination. This activity allows you to track and maintain all attachments in one location.

Note The Exchange server get attachments activity is not available in on-premise multi-tenant and Azure environments.

See [Configure the Exchange server get attachments activity](#).

CMIS activities

The CMIS activities are used to interact with a CMIS compliant EDMS. This means that this standard integration can be used without having to write specific adapters.

See [CMIS](#) for more information.

This group includes the following activities:

- [CMIS get document](#)
- [CMIS add document](#)
- [CMIS update document](#)
- [CMIS create folder](#)
- [CMIS check in document](#)
- [CMIS cancel checkout document](#)
- [CMIS find document](#)

CMIS add document activity

Use the CMIS add document activity to add a document to the repository of a CMIS-compliant site.

Add documents to the library, subfolders in a library, or the root of a list. You can also specify the metadata for a newly uploaded document.

See [Configure a CMIS add document activity](#).

CMIS cancel checkout document activity

Use the automatic CMIS cancel checkout document activity to undo modifications to a document that was checked out of a CMIS-compliant site.

Undoing a check out discards the changes and restores the document to the state it was in before being checked out.

See [Configure a CMIS cancel checkout document activity](#).

CMIS check in document activity

Use the automatic CMIS Check In Document Activity to check in documents to a repository in a CMIS site.

You can also update the properties of a checked in document, if required.

Note The option to specify the file location in CMIS Check in document node is not available for Designer running in On-premise multi-tenant and Azure environment.

See [Configure a CMIS check in document activity](#).

CMIS create folder activity

Use the automatic CMIS create folder activity to create folders in a repository on a CMIS compliant site.

See [Configure a CMIS create folder activity](#).

CMIS find document activity

Use the automatic CMIS find document activity to search for documents in a repository using the document metadata as the search criteria.

When the job is executed, the activity returns all the documents matching the search criteria.

Note The CMIS find document activity only works if the Discovery service is configured on the CMIS-compliant site.

See [Configure a CMIS find document activity](#).

CMIS get document activity

Use the automatic CMIS get document activity to copy or check out a document from a CMIS compliant site.

Specify a document using the document name or unique identifier.

See [Configure a CMIS get document activity](#).

Note The option to specify the file location in CMIS get document node is not available for Designer running in On-premise multi-tenant and Azure environment.

CMIS update document activity

Use the automatic CMIS update document activity to update the properties of a document.

See [Configure a CMIS update document activity](#).

Micro Focus activities

Micro Focus activities provide the ability to integrate with Micro Focus Content Management system.

This group includes the following activities:

- [Content Manager create folder](#)
- [Content Manager add document](#)
- [Content Manager get document](#)

Note The Micro Focus activities are only available for TotalAgility on-premise; they are not available for Designer running in On-premise multi-tenant and Azure environments.

Content Manager add document activity

Use the Micro Focus Content Manager Add document activity to add a new document or check-in a checked out document to a selected Content Management system.

The Add document activity returns Document URI, a unique identifier which you can use to get or check-out the documents later.

If the Content Management system has multiple folders and documents with the same name, use a unique record number or a variable containing the Uniform Resource Identifier (URI) to ensure that you select the folder and document that you need.

Note The Content Manager Add document activity is not available in Azure and on-premise multi-tenant environments.

See [Configure the Content Manager add document activity](#).

Content Manager create folder activity

Use the Content Manager Create folder activity to create a folder in a selected Content Management system.

Use the defined default value for the location, a location relative to the default, or another location. Once you create a folder, use it to manage documents within the folder.

See [Configure the Content Manager create folder activity](#).

Content Manager get document activity

Use the Content Manager Get document activity to download or check out a document from a Content Management system to your computer.

If the Content Manager system contains multiple folders and documents with the same name, specify the unique Record number or select a variable containing the Uniform Resource Identifier (URI) to access the folder or document you need.

Note The ID is the unique record number of a folder or document in the Content Manager system. A Folder or Document URI is the unique value of a folder or a document and is captured using a TotalAgility process variable.

See [Configure the Micro Focus Content Manager get document activity](#).

Script activities

The Script activities are used whenever expression, .Net and Web services are not appropriate.

They remain in the product for legacy reasons. We hope that the newer features of the product will help to reduce the need for any custom code. Until then provide the mechanisms to write code within the process.

This group includes the following automatic activities:

- [Script](#)
- [C#](#)
- [VB .Net](#)

For a script to work in your process, assign process variables as [input and output](#) to the script activities.

- To retrieve (get) the value of a process variable for use within a script, add the variable as input to the activity.
- To change (set) the value of a process variable within a script, add the variable as output to the activity.

Important When configuring a script, you can manually enter variables, such as ("[Firstname]") or select a variable by right-clicking on the rule editor, such as S1 (Process variable). Selecting the variable is only a shortcut to inserting the variable ID without the need of manually typing it. For the script to be valid, you must insert quotes around the variable. For example, ["Firstname"] or ["S1 (Process variable)"].

Script activity

A script is a series of instructions that can be executed consecutively in a given language.

Use the automatic Script activity to perform certain actions, such as:

- Generating email content
- Sending an email
- Looking up data in a database
- Creating a letter in a word processor
- Looping a sequence of activities in a process
- Saving user details to a text file

Note

- TotalAgility does not support Script activity type in an Azure environment and the on-premise multi-tenancy environment.
- On importing a previous version of a process map which contains a script activity, the activity appears read only. The execution of the activity succeeds only when the activity is defined in the Integration server and the "Run on Integration server" property is selected.

See [Design a process map on the Integration Server](#).

See also:

- [Configure a Script activity](#)
- [Script activities](#)

C# activity

Use the C# Script activities to write .Net scripts.

The TotalAgility Designer allows you to create two types of .Net Script activities: C# and VB.Net.

When configuring a script, you can manually enter variables, such as ("[Firstname]") or right-click on the rule editor and select the process and server variables to add to the script. When you select a server variable, the variable appears as Date1 [Server variable]. For the script to be valid, you must insert quotes around it. Example: "[Firstname]".

TotalAgility can validate and run a script without requiring the script developer to build and deploy .Net assemblies. The .Net compliance of TotalAgility reduces development time and increases the ease of deployment.

Example: C# script

In this sample C# script, firstname and surname are input variables. The value of these variables is used to construct the value of the fullname variable, which is an output variable.

```
using System;
using Agility.Server.Scripting.ScriptAssembly;
namespace MyNamespace
{
    public class Class1
    {
```

```
public Class1()
{
}
[StartMethodAttribute()]
public void Method1(ScriptParameters sp)
{
string firstname = sp.InputVariables["firstname"].ToString();
string surname = sp.InputVariables["surname"].ToString();
sp.OutputVariables["fullname"] = firstName + " " + surname ;
}
}
```

Note The script only works if firstname and surname are set as input variables, and fullname is set as an output variable.

See also:

- [Configure a C# activity](#)
- [Script activities](#)

VB.Net activity

Use the VB.Net Script activities to write .Net scripts.

When configuring a script, you can manually enter variables, such as ("[Firstname]") or right-click on the rule editor and select process and server variables to add to the script. When you select a server variable, the variable appears as Variable name [Server variable]. For the script to be valid, you must insert quotes around the variable. Example: "[Firstname]".

TotalAgility can validate and run a script without requiring the script developer to build and deploy .Net assemblies. The .Net compliance of TotalAgility reduces development time and increases the ease of deployment.

Example: VB .Net script

In this sample VB .Net script, the values of FirstName and LastName input variables are used to construct the value of the Fullname variable, which is an output variable.

```
Imports System Imports Agility.Server.Scripting.ScriptAssembly
Namespace MyNamespace
Public Class Class1
<StartMethodAttribute(> Public Sub Method1(ByVal sp As ScriptParameters)
'
' TODO: Add start method code here
'
Dim FirstName
Dim LastName
FirstName = sp.InputVariables("FirstName")
LastName = sp.InputVariables("LastName")
sp.OutputVariables("Fullname") = FirstName + LastName
End Sub
End Class
End Namespace
```

Note The script only works if FirstName and LastName are set as input variables, and Fullname is set as an output variable.

See also:

- [Configure a VB.Net activity](#)
- [Script activities](#)

Document set activities

The Document set activities include the automatic activities that help you add documents to a document set, update the state of documents in a document set, and evaluate rules against document types and update the document set accordingly at runtime.

This group includes the following activities:

- [Document state](#)
- [Document received](#)
- [Evaluate document set](#)
- [Add document type](#)

Document state activity

Use the Document state activity to update the state of document(s) in a document set at runtime.

See [Configure a Document state activity](#)

Document received activity

Use the Document received activity to add one or more documents with their status (Received, Waiting, Validated, Verified, Rejected, or Accepted) to the document set at runtime.

See [Configure a Document received activity](#)

Evaluate document set activity

Use the Evaluate document set activity to evaluate rules against document types at runtime and update the document set accordingly.

See [Configure an Evaluate document set activity](#)

Add document type activity

Use the Add document type activity to add mandatory documents within the process that are dependent on certain conditions (document rules) to the document set at runtime.

See [Configure an add document type activity](#)

Other activities

Other automatic activities available in TotalAgility include XML, Resource info, Document creation and more.

- [XML](#)
- [Resource info](#)
- [Job owner](#)
- [Job variable](#)
- [Sleep](#)
- [Supporting info](#)
- [RESTful service](#)
- [Document creation](#)
- [Ready for review](#)

XML activity

Use the XML activity to construct or modify an XML document without using third-party components.

Using an XML activity, you can:

- Add, modify or delete an attribute in an XML document, or add a new XML string to the document.
- Avoid typing lengthy code and element name conflicts by defining namespace bindings.
- Validate the XML by using the XSD schema.

See also:

- [Configure an XML activity](#)
- [Other activities](#)

Resource info activity

Use the Resource info activity to extract information, such as name, email address, or supervisor ID, about a specific resource rather than use the .NET method on the SDK.

The resource information is obtained specifying the resource identifier. The resource identifier can be a resource ID, resource or role name, or an email address.

See also:

- [Configure a Resource info activity](#)
- [Other activities](#)

Job owner activity

Use the Job owner activity to set the current owner of the running job. Based on some rules or decisions, the owner of the job may vary.

The job owner owns the jobs regardless of who performs or completes the tasks. This ensures visibility to assigned jobs at all times. For example, as the team leader (TL) is responsible for all jobs the team

completes, assigning the TL as the owner of the jobs means that the TL can view and track progress of the team as required.

A job owner can be an individual or a group resource. However, only one resource can be the job owner at a time.

A job owner can be a static or dynamic resource. If dynamic, the real job owner can be assigned at runtime.

Only a job owner or the supervisor of the job owner can change the owner of the job at runtime.

See also:

- [Configure a Job owner activity](#)
- [Other activities](#)

Job variable activity

Use the Job variable activity to extract information from a running job and return the values into variables defined within the current job. It is commonly used in exception maps which are reused across multiple jobs.

For example, in a Housing Benefit Claims system, you can launch a Job Overrun exception process map if it takes more than two hours to process a particular Housing Benefit application form. The Job Overrun exception map would extract data, such as who is processing the claim and other details from the Claim Housing Benefit job.

The Job variable activity reduces development time, which would otherwise involve the following steps:

- Calling the API `getjobvariablevalues`.
- Setting up a complex variable to pass data into `getjobvariablevalues`.
- Extracting and passing values from the complex variable into the process variables for subsequent processing.

See also:

- [Configure a Job variable activity](#)
- [Other activities](#)

Sleep activity

A Sleep activity is used to delay a job for a specific period of time.

At runtime, the sleep activity makes the job wait for the specified amount of time. For example, in an event map, which is triggered when a COM call fails to send an email, you can configure the Sleep activity to set the job to sleep for 60 seconds before attempting to send the email again.

Note We do not recommend Sleep nodes as they impact performance; only use them for very short waits.

Use process events for internal and external inter-process communication. See [Process events](#) for more information on configuring and using process events.

See also:

- [Configure a Sleep activity](#)
- [Other activities](#)

Supporting info activity

Use the Supporting info activity to generate contextual information that may help a user track job progress.

For example, in a process handling insurance claims, use a Supporting info activity to provide information containing the customer name, insurance type, and claim amount to the user.

You can:

- Add multiple Supporting info nodes to a process to allow updating the contextual information as the job progresses.
- Use the APIs to update and display the supporting info.
 - Update the supporting information directly by calling `JobService.UpdateJobCustomerData`.
 - Display the supporting information for a job to the user by calling any of the `TakeActivity` APIs.
 - Display the supporting information on the work queue of the user by calling the `GetWorkQueue` API.

See also:

- [Configure a Supporting info activity](#)
- [Other activities](#)

RESTful service activity

Use the RESTful service activity to integrate TotalAgility with external applications.

The RESTful service activity can integrate with external applications through the RESTful web service references.

Note TotalAgility supports only simple types of RESTful web services, which should not be used with complex data structures.

TotalAgility does not support specifying any custom headers to be passed to a RESTful service activity.

RESTful web services typically map the four main HTTP methods to the operations they perform: Post, Get, Put and Delete.

The web service only sends the basic HTTP verbs – GET, PUT, POST, and DELETE – to the server and expects JSON or XML as response.

For example, `http://service.com/emp/123`

XML format:

```
<Emp>
  <Name>ABC</Name>
  <Id>321</Id>
  <Email>abc@domain.com</Email>
  <Org>Kofax</Org>
</Emp>
```

JSON format:

```
{
  "Name": "ABC",
  "Id": "321",
  "Email": "abc@doamin.com",
  "Org": "Kofax"
}
```

See also:

- [Configure a RESTful service activity](#)
- [Other activities](#)

Document creation activity

Use the automatic Document creation activity to create different document types, such as a Microsoft Word document or an HTML file (web page), in a process map.

For a document, you can specify the template to use and the placeholders to populate.

Note Only Microsoft Word templates (.dotx) can be used to create a new document.

In Microsoft Word, fields are used as placeholders for data that might change in a document and for creating form letters and labels in mail merge documents. Merge fields let you customize the content of individual documents.

For example, to create a letter, you may define a letter template with the following placeholders:

- <Date>
- <Recipient's Address> (may include addressee's name, street address or post office box, city, province, postal/zip code or country)
- <Salutation>
- <Subject>
- <Body>
- <Complimentary Close>
- <Signature Block>

The Document creation activity also takes into account carriage returns passed into a document and adjusts the other text accordingly. For example, <<Address>> could be multiline.

Within TotalAgility, you can generate a document that contains a table where a row is populated for each line item passed to it. This helps control the formatting of the data passed into the placeholders and creates documents in which tables are automatically populated with dynamic data.

See [Create a placeholder in a Word 2007 document](#).

Use placeholders to populate a table in a document with dynamic data. Position each placeholder in the row and column where you want to populate the data. For example, to populate the Loan Application table from Row 2 Column 1, position the placeholder there. See the table.

Loan ID	Loan Amount	Loan Duration	Applicant	Address	Contact Number
«Details»					

The placeholder placed in the table shall populate the table with the data in the mapped variable.

Once the table is populated, any text outside the table shifts accordingly.

Loan ID	Loan Amount	Loan Duration	Applicant	Address	Contact Number
101	15000	5 years	Mark	Derry	7412545612
102	30000	10 Years	Peter	Hyderabad	6455456542
103	50000	12 Years	Srinivas	London	9878455612
104	2000	1 Year	Charles	Belfast	7418529631
105	1000000	20 Years	Reddy	Derry	7456123891

The placeholder placed in the table shall populate the table with the data in the mapped variable.

Note During design, you might not know the number of rows (records) required in a table. To address the issue, add rows dynamically by passing the input data through dynamic complex variables to a table.

You can create an HTML page based on a Word template and save the output to a variable, for use across the Designer.

For example, you can map the output variable to the body of an Email node, so that whenever a new HTML page is created based on the selected template, an email is sent to the relevant users.

See also:

- [Configure a Document creation activity](#)
- [Other activities](#)

Ready for review activity

Use the Ready for review activity to set the checklist state as ready for review. At runtime, the current state of the checklist is displayed in read-only mode and the next column is displayed in an editable mode.

For example, in a document review process:

1. Resource A completes a checklist as part of the "Write" activity.
2. The state of the checklist is set to "Ready for review" by a "Ready for review" node.

3. The checklist is available as part of "Review" activity, which in turn can be completed by Resource B.
4. The checklist is displayed in two columns (as the state is Ready for review): the first column displays the original values (as set in the Write activity) and is read-only; the second column is editable.



See also:

- [Configure a Ready for review activity](#)
- [Other activities](#)

Activity input and output

Define input and output variables for an activity.

You can add the same variable as both input and output. However, you cannot add the same variable more than once as input and output. When using an entity variable to an activity as input or output, either set an entire entity or an individual attribute as input or output variable.

You can use both process and server variables as input (NOT output) to Classification, Extraction and Composite activities for use in the Kofax Transformation Designer (KTD) script. However, you can only use simple variable types and cannot use Document, Folder, Checklist, XML, XML Expression and Complex variables. Therefore any document or folder variables configured for these activities are not available for use as input variables. The String input variable for Scan profile name on Composite activity is also not available for use.

Input variables for capture activities become available in Transformation Designer script. For example, if you consume an input variable called "test", you can access this variable in the Transformation Designer script as:

```
pXDoc.Fields(1).Text =
pXDoc.ParentFolder.XValues.ItemByName("KTA.InputVariable.test").Value
```

You can consume the following document set properties as input or output to an activity.

System properties	
Number of Documents	Number of documents available in the document set.
Documents	Document ID, Name (specified in document set for the Document Type), Source (source defined when you add a document to document set), Document Type ID, Document Type Name, Document State, Document State Description, Date Received.
Documents Summary	Document Type, Source (source defined when you add a document to document set), State Description and Date Received.
Required Document Summary	A list of document type names and description provided in the document set.

Received Document Summary	The description of document type names and the rule comments (if any rule is applied).
Document type	
Number of Documents	Number of documents in a document type.
Status	Status of the document type.
Status Description	Description of the document type status.
Comment	Document type rule comments (if a rule is applied for a document type).

You can set the document set properties as input (not output) in the following nodes:

- Decision
- Email activity
- Loop activity
- Web service activity
- .NET activity
- Activity preconditions
- Ordinary activity
- Manual Capture activities

Service level agreement

Service level agreement (SLA) is the visual representation of a threshold status of activity state on a work queue.

You can specify fully configurable SLA indicators for an activity allowing process participants to rapidly see when an activity is at risk of exceeding target, and allowing them to take corrective action if necessary.

TotalAgility supports a maximum of five statuses, which are defined at the server level. The status titles, such as Red, Amber or Green are configurable.

See [Configure the SLA and work assignment](#).

Example: Define the SLA status indicator for an activity to change status

Configure the SLA thresholds of a process whose expected duration = 2 Hours.

- Amber threshold = 1 hour (Before)
- Red threshold = 30 minutes (After)

If the activity starts at 12:00:00 AM and the expected finish time is 2:00:00PM:

- Up to 1:00:00 PM, the SLA status indicator appears Green on the work queue. This means that the activity is pending and the current time is outside the Amber threshold.
- When the time is 1:00:01 PM (less than 1 hour from the expected finish time), the SLA status indicator turns Amber. This means that the activity is still pending and due to be completed; the current time is within the defined Amber threshold.

- When the time is 2:30:01 PM (30 minutes after the expected finish time), the SLA status indicator turns Red. This means that the activity is overdue. If the current time is within the defined Red threshold or exceeds the expected duration, the SLA status of the job remains Red.

Time and cost

You can configure deadlines, service level agreements, triggers and cost properties for a process and an activity.

Time and cost for a process

Duration/Expected finish time

The time when the job is expected to complete. The duration can be static (in days, hours and minutes), dynamic (a date variable) or a milestone.

Service level agreement

See [Service level agreement](#).

Expected cost

Overall expected cost of performing the job.

Budget

The amount of money allocated to a process (mainly case fragments). A budget helps managers track and monitor key business processes to determine whether the process is under or over budget.

The budget can be a static amount or dynamic amount.

The budget and expected cost are different. For example, a typical Appeals case process is made up of several case fragments such as Register an Appeal, Medical Examination, or Convene Court Hearing. A budget is usually associated with the overall case fragments and is the summation of the expected cost of each case fragment.

Duration/Budget Triggers

See [Process triggers](#).

Time and cost for an activity

Priority

The level of importance for the activity with 1 being the highest priority and 100 being the lowest. Setting the priority ensures highest priority activities are picked up first. Activities are processed sorted by due date and then by priority.

Target duration

The expected duration required to complete the activity. The target duration helps to gauge productivity. For example, if the expected duration of an activity is 5 minutes, the user must spend not more than 5 minutes on the activity. A user who spends 10 minutes instead of 5 has a 50% productivity rating. The target duration can be static (in days, hours, minutes and/or seconds) or dynamic (a Short or Long variable).

Target due date

The due date when the activity is expected to be complete. The target due date can be calculated based on target duration, variable or a milestone.

- **Target Duration:** The due date is calculated as the target duration from the time the activity becomes available. If a lead time is used, then activity due date = target duration + lead time. For example, if the target duration of an activity is 4 hours, its lead time is set to 2 hours and the activity becomes available at 12:00, the due date of the activity is 18:00 (depending on business calendar). If the user takes an activity at 13:30 and completes it by 17:30, the activity is not overdue. However, if the user takes the activity at 16:00 and completes it at 20:00, the activity is overdue by 2 hours.
- **Variable:** The activity due date is calculated as the value given for the due date. If you specify the lead time, the activity due date is calculated as variable +/- lead time. If the business calendar is enabled, due dates are calculated based on working days and hours. For example, one working day is equal to 8 hours rather than 24 hours.
- **Milestone:** The due date is calculated based on the selected milestone. If you specify the lead time, the activity due date is calculated as milestone +/- lead time.

Lead time

The time period when the user may take the activity. For example, if set to 2 days, the user can take the activity any time during the 2 days.

The lead time can be negative (Before) or positive (After). For example, if the value of Goods Delivered milestone = 17-02-2012 17:00, the target duration of Final Check activity = x variable, and Lead Time = -1 hour. This means that the Final Check activity must be completed 1 hour before the Goods Delivered milestone is reached.

OR

If the value of Goods Delivered milestone = 17-02-2012 17:00, the target duration of Goods Received activity = x variable, and Lead Time = 1 day. This means that the Goods Received activity must be completed 1 day after the Goods Delivered milestone is reached.

Note The negative lead time cannot be set if the target duration is used to calculate the activity due date.

Service level agreement

See [Service level agreement](#).

Triggers

See [Activity triggers](#).

Expected cost

The overall expected cost of the activity upon completion.

Fixed cost

The cost of the activity irrespective of the length (duration).

Milestones

A milestone signifies the completion of a major activity or a set of related activities.

Use milestones to mark major events, such as important dates or deadlines in a business process. For example, use a milestone to mark a product delivery date.

Recording of a milestone target date starts once the job starts. The milestone's target date automatically changes if you reschedule the associated activity. For example, in an Employee Hiring business process, if the Employee Start Date and 3-Month Review Date are two milestones and if the employee's start date changes, the 3-month review date also changes.

After defining milestones at the process level:

- Add milestones for a map or activity to track job progress. Set interim milestones to track if you are behind schedule for the interim target date and take corrective action while you still have time to recover. For example, add a milestone for the entire Deliver Training Course process or set interim milestones for the Basic and Advanced course.
- Use milestones to schedule a process or activities and calculate the due dates. For example, schedule the Security Check task to appear on the HR Manager's work list four weeks after the Employee Hire Date milestone date.
- Schedule activities forward or backwards from a milestone. For example, schedule the Set New Employee Machine task to appear on Network Services work list two days before (- 2 days) the Employee Start Date milestone date.
- Set the milestone to achieve when an activity becomes pending or is completed. For example, set the Candidate Selection Complete milestone to achieve as soon as the HR Manager takes and completes the Select Final Candidate Based on Interview Results task.
- Reschedule or change a milestone target due date. The system automatically updates the activities (that are not pending) with due dates linked to that milestone. For example, if you shift the Interviews Completed milestone date, the due dates of linked activities, such as Shortlist Candidates and Book Interview Room, shift automatically.
- Set milestones relative to each other when one milestone depends on another milestone. For example, make the Training Materials Completed milestone date relative to the Deliver Training Course milestone date. If you reschedule the Training Course, all linked milestones dates are rescheduled automatically.
- Link milestones to process states. For example, the Hiring process include a series of states from Pre-interview > Interview > Selection > Hired.

Note State refers to the status of a job at a particular point in time. A percentage complete is usually assigned to each state so that you can monitor the progress of a job. For example, a parcel can go through a series of states from New (0 %) > Dispatched (70%)> Confirmed (100%).

You can set a milestone to be static, dynamic or relative to other milestones:

- A static milestone has target duration in number of days, hours, minutes and seconds, or relative to when a job is created. For example, set the "Interviews Complete" milestone to reach 24 days after the "Hiring" job starts.

- A dynamic milestone has the target duration as date variable that contains the duration value.

Important You can use the Kofax TotalAgility Workspace to change the milestone dates at runtime. If you change a milestone variable value, the milestone is NOT updated automatically; you must use the UpdateJobMilestone API to update the milestone.

- When you set the target duration relative to another milestone, at runtime, and if you update a milestone, all milestones relative to it are also updated. For example, if the "Deliver Training Course" milestone is relative to the "Training Materials Completed" milestone, and if you change the "Training Materials Completed" date, the "Deliver Training Course" milestone is rescheduled automatically.

You can set the milestone to reach after (for example, three days later than) or before (for example, three days earlier than) the due date of the selected milestone. If the value is 0, the milestone will be achieved when the relative milestone is achieved.

Once a milestone is associated with a process or activity, you can view associations for a milestone.

See also:

- [Create a milestone](#)
- [View associations for a milestone](#)
- [Create a milestone trigger](#)

States

States are the changes through which a process can pass from inception to completion. Use states to monitor the status or percentage complete of a particular job. For example, a parcel order can go through a series of definable states, such as ORDER CONFIRMED > PACKED > DISPATCHED > IN TRANSIT > DELIVERED.

See [Create a state](#).

You can associate actions with a state and associate state with an activity. The actions are initiated when the activity becomes pending and the state of the job changes. Or when the state of the job changes at any time during the lifetime of the job. For example, you can change the state when viewing job properties or by using an API on the SDK.

You can associate a state with one or all of the following actions:

- [Restart](#)
- [Event](#)
- [New Job](#)

Restart action

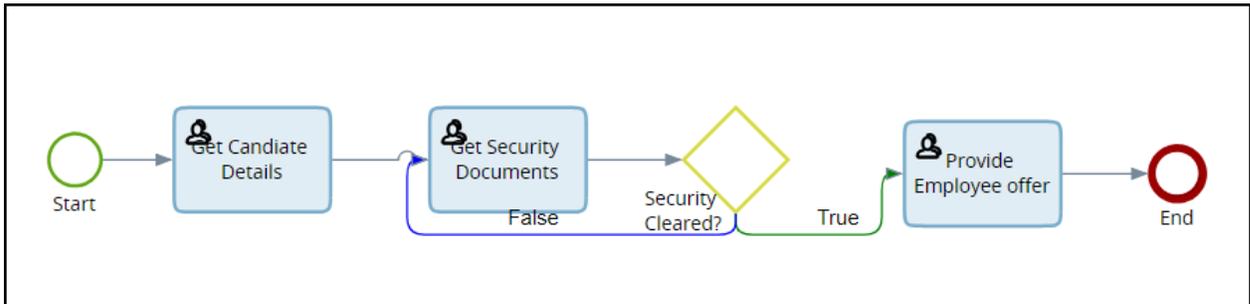
Use the Restart action to bypass certain activities and restart the job at a different point in the process when the job reaches a specific state.

For example, in an Employee On-boarding process, define the following states of a job:

- New Employee (0%)

- Security Clearance Approved (50%)
- Employee On-boarding Complete (100%)

If the new employee is not given security clearance, the job would roll back or restart at the initial point in the process.



You can also restart a job at an activity within an embedded process when a job state changes.

Note Use the ChangeJobState API to apply the Restart action.

Event action

Use the Event action to associate a business event with a state such that the event action takes place when the state of a job changes and the activity completes.

For example, to have up-to-date real-time reporting, define business events, such as New Customer Accounts, Approved Mortgage Loans in a Banking process, and then use states to record approved mortgage loans.

Use the State event identifier when raising events. The State event identifier identifies and records the state event.

To monitor and extract the information from specific fields of an event, map the event parameters to process variables.

New Job action

Use the New Job action to associate a process with a state. Set the state so that when the state of a job changes, the system spawns the process to perform a certain action. The associated process is completely independent of the main process. The new jobs can be run automatically, depending on requirements.

For example, in a Goods Delivery process, when the state of a parcel order changes from IN TRANSIT to DELIVERED, the system can launch an independent process called Send Customer Invoice.

Process events

With TotalAgility you can model both external and internal (inter-process) synchronization points.

TotalAgility monitors specific business events and responds by completing an activity that has been in a "wait state" for that particular business event.

You can record when real events raised against a job have occurred, which subsequently determines when a task that is in a wait state can continue or be completed.

TotalAgility can handle both types of events:

- **External:** Events that occur outside of TotalAgility and apply 80% of the time. For example, processing the car insurance application can continue once the loan agreement is signed.

Note Use the TotalAgility API methods to record external events.

See [Access related documentation](#) for more information.

- **Internal (inter-process):** Events that occur between different process maps within TotalAgility.

See [Record process events](#) for more information.

Notes

Use notes to insert comments related to your process. For example, you can use a note to suggest a process improvement.

A process note can only be added in the Kofax TotalAgility Workspace (see *Kofax TotalAgility Workspace* help). However, once added, you can view the note in the TotalAgility Designer, and indicate whether an action has been taken for the note. The note details display the date and name of the person who took action.

Note

- Process notes are created and updated independent of process versions.
- Notes cannot be added or deleted within a process map.

See [Update notes](#).

Document set

A document set is a group of related documents that can be managed either individually or as a single entity. You can specify in your process whether to use a document set.

Using document set, you can define conditions based on the document set or one of its document types within processes. For example, you cannot send the application for approval until all document requirements have been met.

A document set rule gives complete visibility to the status of the documents required to complete a process. For example, a document set rule can be used to halt the process at a stage until document 1 of type A and 2 of type B are received. You can also configure exceptions to raise at the specified interval when the document date elapses.

When you skin a process, you can overwrite the rules associated with the document types.

TotalAgility provides Document set control that can be used to display the document set at runtime and also the summary of document types based on the mode of operation (Customer or Case Worker) specified at the design time.

Note

- TotalAgility only supports a document set in parent processes, case fragments and cases; it does not support document set in a subjob or embedded process.
- You must have the "Update document set" user rights to update the runtime status for a document rule.

When a process is exported and imported, the document set, associated extraction groups, and the "Update document set" functional access are maintained. When documentation is generated for a process, this data is included in the output.

See also:

- [Configure a document set](#)
- [Document set control](#)

Roles

Many organizations assign work to a role, such as a Project Manager, rather than directly to a named individual.

Using roles rather than naming individuals gives you more flexibility in that you may not know the name of the person who will perform a task, although you may know the role required.

In TotalAgility, you can assign work to one of the following:

- An individual, such as John Smith.
- A role, such as Finance Manager.
- An organizational group, such as Finance.
- An unknown resource, where you use a variable and the system identifies the resource at runtime.
- Someone previously involved in the process, such as the job creator or the person who performed a previous activity.

When designing a process, you can define a number of roles that are specific to that business process.

See [Create a role](#).

You cannot use groups or other roles as role members. But an individual can belong to more than one role. Changing the members allocated to a role in one business process does not affect any other business processes in the system even if they have the same role name.

A role can be fixed or floating.

Note The changes to static roles affect all existing and new jobs, whereas the changes to floating roles only affect new jobs.

Once a role is created, assign a role to an activity. See [Assign resources manually](#).

If the activity is an embedded process, it uses the role from the parent map (if the role already exists).

If the activity is a subjob, it uses the role created for the subjob and not from the parent map.

Types of roles

A role can be fixed or floating. Any changes to fixed (static) roles affect all existing and new jobs, whereas the changes to floating roles affect only new jobs.

Fixed roles

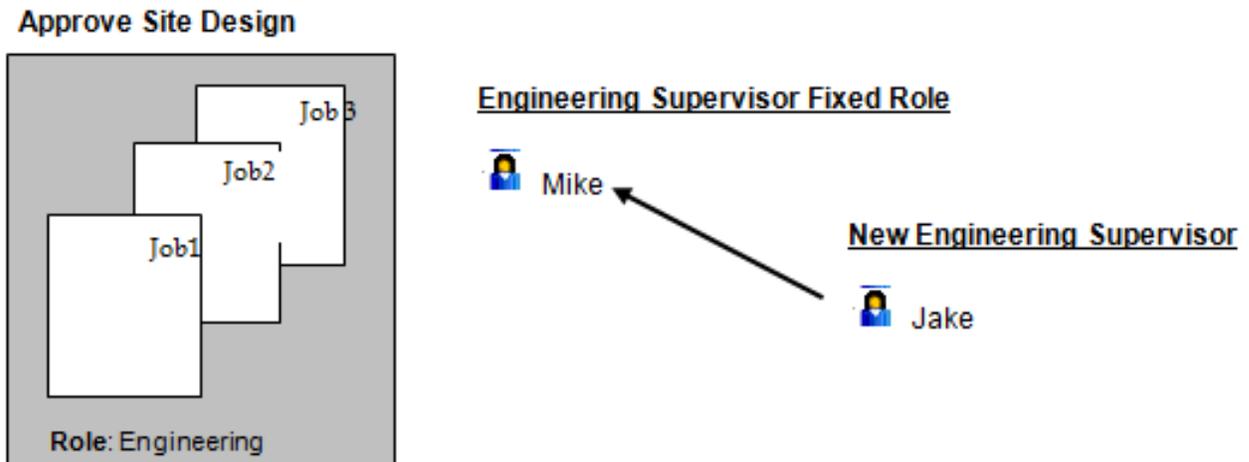
Fixed roles are the roles where role members are not likely to change in the immediate future. For example, a company usually has only one Finance Director; an organization may have five Executive Engineering Supervisors.

Use fixed roles:

- When the number of members for the roles is not likely to change. A fixed role can have multiple members but cannot have a group or another role as a member.
- When a task within a process will be performed by a known set of role members (case workers) who are not likely to change, and you know who they are.

During design, any changes made to a fixed role impacts all new and existing jobs created from any version of that process.

For example, in the following illustration, Jake joins the Engineering Supervisor fixed role. He will immediately see all activities assigned to this role in all live jobs for the Approve Site Design process.



Floating roles

Floating roles are the roles where the role members are added or updated depending on the task or job.

Floating roles are job-specific and allocated on a per job basis at runtime. For example, a new legal case may need to be assigned to a specific type of case worker. A drug case or a homicide case would require case workers who specialize in these fields. The case worker assigned depends on the actual job instance. You could use a web page to let a user populate the case worker role member dynamically at runtime or change role members at any time.

Use a floating role when the changes to the role members impact only a specific job that is based on a specific process.

Roles defined at the case level are automatically available to any fragments associated with the case. A change at the case level filters through to all activities in related fragments. In addition, you can also define a role at the case fragment level.

See [Create a role](#).

Resource assignment

Assign resources and roles to an activity, and configure email notifications.

You can assign resources manually, or by applying rules.

Static versus dynamic resources

Resources can be static or dynamic based on whether the resources are assigned to an activity at design time or runtime.

Static resources

Assign resources at design time if you know in advance which group, individual or role can perform the job. For example, to hire personnel, select HR.

Note A process map has access to all roles created within that process map. For a fragment, any roles defined at a case level are also available. You can assign roles to an activity along with other types of resources, such as groups, individuals, or variables.

Dynamic resources

Assign resources at runtime to make the decision at the time of taking the activity. For example, select a resource with a specific skill level to complete a complex job.

Manual allocation versus dynamic allocation

You can assign resources and roles to an activity either manually or dynamically.

Manually allocate resources

Manually define which resources should work on a particular activity. Allocating resources manually gives you the flexibility to assign more efficient resources to activities of high importance to better balance the work.

Note You can manually allocate resources only for manual activities. Manual allocation and rules cannot be used simultaneously.

When the activity is set to use manual allocation, the status appears as Awaiting Allocation. However, if preconditions are defined for an activity, the status is Awaiting Events, and once the necessary events are raised, the status changes to Awaiting Allocation.

Once a resource is assigned to the activity awaiting allocation, the status of the activity changes to Pending.

Dynamically allocate resources

You can allocate resources at runtime, depending on their skills and availability. Allocating resources dynamically has the following advantages:

- Provides more flexibility to your business processes, as opposed to using design-time static resources. Static resource allocation only works in the ideal working environment where each activity is assigned to a specific person who is always available.
- Helps you model real-life work allocation. In real life, jobs can only be assigned to the right user (with the right skills) who are available at a given time.

To define a dynamic resource, do the following:

Define a String variable for the process, and assign this variable as a resource to the activity. At runtime, the System populates this variable with a value containing the ResourceID in the XML format.

Note You can use a .NET activity to make the method call and populate the string variable. This activity is normally inserted before the dynamic activity

TotalAgility provides APIs to use as dynamic variables. For example, the DynamicResourceService is used to create dynamic resource XML. Several methods are available within DynamicResourceService, such as AddResource, AddGenericResource, DeleteResource, GetNumberOfResources, and AddResourcesUsingServerIds. One method is used to pass in a resources user name and get back the resourcesID in XML format.

The method to use depends on the conditions within the process map

You can assign resources dynamically with or without applying rules, or using a previous resource.

See also:

- [Assign resources manually](#)
- [Assign resources by applying rules](#)
- [Reuse resources](#)
- [Set up notification email](#)

Assign resources by applying rules

Apply rules if resource requirements for an activity are complex.

For example, apply rules if more than one resource is required to review and approve a document. By applying rules, you can group the reviews as a single activity with multiple resources, rather than separate activities with different resources.

You can also apply rules to an entire business process, and not just a single activity. You can assign rules to a Create Subjob activity; a subjob is created for each resource assigned to this activity. See [Configure a Create subjob activity](#) for more information.

Note You cannot apply rules if resources are assigned manually.

1. On the properties panel of the activity, click the **Resource assignment** tab.
2. Select **Resourcing** for **Type**.
3. To set the resources who are required to perform this activity, perform the following steps:
 - a. Click **Add** for **Resources**.
 - b. Select the resources. Resources can be static resources (group, individual and/or roles), or dynamic resources (process and server variables of String and XML types).
 - c. Click **Done**.
4. Set the **Security level** of the activity with 1 being the highest level of security and 10 the lowest. (Default: 10)

Security levels control which resource can work on an activity. For example, an activity with security level of 1 can only be completed by a resource whose security level is 1, or an activity with security

level of 3 can only be completed by resources whose security level is 3, 2, or 1. However, an activity with security level of 10 can be completed by any resource.

Note This property is only available for ordinary activities.

5. Set the **Skill level** of the activity with 1 being the highest skill level and 10 the lowest. Skill level ensures only the resource with the required skill level is allowed to perform the activity. For more information, see [Advanced](#) properties of a resource.
6. Select **Apply rule**.
7. Configure the following rules for completing an activity.
 - [Activity access](#)
 - [Exclude resources](#)
 - [Use exit condition](#)
8. Click **Save**.

Activity access

You can specify if single or multiple users should work on the activity, and the order in which they must complete the activity.

1. Select one of the options for **Activity access**. (Default: Concurrent)

Option	Description
Concurrent	Permits the specified resources to complete the activity in any order or at the same time. For example, with Invoice Approval, concurrent access is allowed, and everyone can approve or reject at the same time. Capture activities do not support the concurrent activity access.
Single	Permits the required resources to complete the activity in any order, but only one resource can complete the activity at one time. For example, a legal document can be officially reviewed and updated by only one person at one point in time.
Sequential	Permits the selected resources to complete the activity in the order specified. Sequential assignment ensures people do not work on activities unless they are first taken or reviewed by people lower in the organizational hierarchy. For example, a junior manager must approve the loan application before it passes to the senior manager for final sign off. <div style="background-color: #f0f0f0; padding: 5px; margin-top: 10px;"> <p>Note In a Create subjob activity that uses rules, resources must complete the subjobs using either sequential or concurrent activity assignment. Non-concurrent activity access is not available.</p> </div> <p>For the Sequential activity access, you can also specify the order in which the resources must complete the activity. Select the resource in the Resources box and then use the ## to set the order.</p>

2. Specify the **Number of resources** required to perform the current activity.

Option	Description
All	Requires all assigned resources to complete the activity.

Option	Description
Static	The number of resources required to complete the activity. For example, if the number of resources assigned to an activity is 3, a static value of 2 would mean that two out of the three resources assigned to the activity must perform the activity. Note The number of resources required to complete an activity cannot be greater than the number of resources assigned to an activity.
Dynamic	A Long or Short variable to hold the value of number of resources.

- To expand group resources and treat each member of the group as an individual resource required to complete the activity, select **Expand group resources**.

Note

- The runtime group functionality does not affect the subjob activity.
- If the group resources are not expanded, not all members are required to complete the activity; any individual within the group resource can take the activity and complete it.

Exclude resources

You can exclude a resource or role from completing an activity. For example, you can assign the Expenses Approval activity to everyone in the Finance group, except for the person (job creator) who submitted the expenses claim.

Click **Add** in the **Exclude resources** box and select the resources to exclude.

Note You cannot exclude a resource if it is directly assigned as usable resource.

Use exit condition

Use exit conditions to ensure that people do not work on activities that are already rejected. You can set up an exit condition for an activity so that the activity is complete when either the exit condition is met or all the resource settings are complete. For example, if two resources must approve a loan but either one can reject it, the resource settings require both resources to complete the activity. But the exit condition is set so that the activity can be completed if either resource rejects the loan.

- Select **Use exit condition** to apply the exit condition to an activity.
- Select the variables to create the exit condition.
- Click **Validate** to validate the exit condition.

A message appears to indicate whether the script is valid.

Communicate with resources

You can communicate with resources by setting up email notification, sending resource notes or creating alerts.

Activity notification

An activity notification is a way of notifying a resource through email that work is ready in an activity and is pending in the queue. When a job is created on the process, an email is sent to the usable resources of the activity for which activity notification had been enabled.

You can set an activity notification for a process as well as an activity. When set for a process, any manual activities added thereafter inherit the settings. When set for an activity, the settings apply only for that activity.

You can create the content of the email, such as subject and body, and embed a URL in the email to take the user directly to the work. For example, set an activity notification on the Validate Loan Form activity that alerts a Banking officer to check the details on a loan application. A URL embedded within the email launches the relevant web page or job with the customer's details, so the officer can approve or reject the loan application.

Note An activity notification only works if the SYSTEM Process Email Activity process map is installed. See [System processes](#).

Resource notes

Resource notes allow you to send a note directly to another resource.

A full API set is available to read notes sent to you by other resources, create new notes and delete read notes.

This feature is available in the Resource Mailbox in TotalAgility Workspace. When you log onto the TotalAgility Workspace, you can view all messages in your inbox and reply or send new messages to other resources.

You can effectively communicate within the Workspace itself, without using any Mail servers. For example, use this feature to direct a resource to take up a priority case. You can then quickly post a note to the relevant user from within the TotalAgility Workspace. You can also view any unread notes.

A Pending notes icon appears on the header of your TotalAgility Workspace to indicate pending unread notes.

Alerts

An alert appears on the work queue of the resource to notify them of any impending escalations.

You can create an alert for a milestone, process or an activity.

Triggers

Triggers are user-defined conditions that can automatically initiate a response and help you avoid violations and better manage your business processes.

For example, set up a budget trigger to execute when 90% of the budget for a process has been used and to inform you in advance if a business process is about to go over budget.

Trigger types

TotalAgility includes the following types of triggers:

- Budget triggers: To avoid cost violations.
- Duration triggers: To avoid target duration breach in a process.
- Activity triggers: To avoid target duration breach in an activity.
- Milestone triggers: To avoid deadline violations.
- Alerts: To notify a resource of any impending escalations.

Trigger creation

Use an escalation map to create a specific job to deal with job duration, budget, activity due date or milestone triggers.

Note To track the source of the trigger, you must assign variables as initialization parameters to the escalation map.

See [Triggers and escalation map initialization parameters](#).

Alternatively, create an alert task to appear on the work queue to notify a resource of any impending escalations.

You can associate multiple triggers for a job or an activity. For example, in the Personnel Hiring process, set two triggers in the Schedule Interview milestone:

- Trigger 1 to execute 2 days before the target milestone date so you can ensure all pre-interview tasks are completed.
- Trigger 2 to execute 2 days after the target deadline has passed, to remind you to send out offer or rejection letters.

Process triggers

Create a process trigger to actively manage your Service Level Agreements.

The process triggers include:

- Duration triggers
- Budget triggers

Duration triggers

Set a duration trigger for a process to execute when the set time period in relation to the expected job due date has passed. The duration triggers help to monitor the progress of a business process and ensure timely escalations.

Triggers are only executed for an active job; they are not executed if the job is on hold or completed. See the following table for an example.

Job due date	Job escalation date	Job status	Current date	Trigger fired? Yes/No
12.00.00 26.06.2013	12.00.00 26.06.2013	Job Alive	12.00.00 26.06.2013	Yes
12.00.00 26.06.2013	12.00.00 26.06.2013	Job Complete	12.00.00 26.06.2013	No
12.00.00 26.06.2013	06.00.00 27.06.2013	Job Alive	06.00.00 27.06.2013	Yes

Budget triggers

The business process budgeting or costing shows how resources relate to processes. It helps management benchmark and focus on becoming more competitive and cost-effective over time.

The budget triggers help you monitor and deal with a business process that is about to go over budget. You can configure budget triggers to take action when the budget spent runs outside its normal business tolerance; when the expected cost of a completed job is under or over the estimated target budget.

The budget triggers are typically used for business processes that use resource costing; the budget spent is calculated based on resource costs, fixed costs, and actual time spent on tasks.

Example: To illustrate when a trigger is executed for the specified tolerance, budget and job cost

See the following table for examples whether the trigger will be executed for the specified tolerance, budget and job cost. Column description is as follows:

- **Budget:** The budget set at design time.
- **Cost so far:** The accumulated cost of a job created on a map with tolerance and budget.
- **Target budget tolerance(%):** The specified tolerance in percentage of the budget when the trigger will be fired.
- **Is trigger fired?:** Whether the trigger is fired. The reason why the trigger was fired or not fired.

Budget	Cost so far	Target budget tolerance (%)	Is trigger fired?
£300	>=30	10%	Yes. The trigger is executed as soon as the cost is recorded as £30 against that job.
£500	>=450	90%	Yes. The trigger is executed as the cost against the job reached £450, that is, 90% of £500.

Budget	Cost so far	Target budget tolerance (%)	Is trigger fired?
£300	140	50%	No. A trigger is not yet executed because the cost so far is only £140, and has not reached the £150 mark (50% of £300).
£1000	1090	110%	No. A trigger is not yet executed because the cost has not yet reached £1100 (110% of 1000).
£100	>=120	120%	Yes. The trigger is executed as the cost has reached £120 (120% of 100).

See also:

- [Activity triggers](#)
- [Milestone triggers](#)

Milestone triggers

Use milestone triggers to take an action close to a target date. For example, if a project deadline cannot be met, use a milestone trigger to automatically alert (email) the project manager who can address the issue by assigning more resources to the project or adjusting the due date.

You can define milestone triggers for a process to be executed before or after the milestone due date is reached, or define it to be executed when the milestone due date is met.

See [Create a milestone trigger](#).

Example: To create a milestone trigger

Create a milestone in a Sample process map with the following information.

Milestone Name	Target Date	Trigger Firing Target
Milestone 1	2 days from the time the job is started.	+1 day 0 day -1 day

Create a job on the Sample map at T0 = 12 o'clock on 26.09.2016.

As the milestone target date is 2 days from the date the job was created, the target date will be 12 o'clock on 28.09.2016 (the business calendar is off).

- If the milestone is not achieved, a trigger is executed on the following dates:
 1. 12 o'clock on 27.09.2016 - for a trigger execution target of - 1 day
 2. 12 o'clock on 28.09.2016 - for a trigger execution target of 0 day
 3. 12 o'clock on 29.09.2016 - for a trigger execution target of + 1 day
- If the milestone is achieved, for example, on 18.00.00 27.09.2016 (6 hrs after the 1st trigger is executed), only the first trigger is executed on 12.00.00 27.09.2016 because at this time, the milestone

was not achieved. The second and third triggers are not executed, because the milestone was achieved before the second and third trigger execution target dates.

The actual trigger execution date also depends on the monitor interval time. For example, if the monitor is configured to check every hour, and the last time the monitor checked the system was 12.20 and the trigger execution date falls on 12.30, the actual trigger is executed at 01.20 (the next time the monitor checks the system).

Activity triggers

An activity trigger is set up against an activity due date.

There could be numerous reasons for an activity becoming overdue, the assigned resource may be overloaded with work or may be sick. Timely escalation helps in taking actions in time.

An activity trigger is executed when the time period relative to the activity due date has past and as soon as the activity becomes pending or is taken. However, you can set the activity trigger to execute before the activity due date is reached. A trigger cannot execute for an activity that is either complete or on hold. For example, you may need an alert 2 days before an activity due date if no resource is picking up and completing the activity (which means the business process is not progressing as it should).

Example: Trigger to notify customer

Create the following triggers against the Notify Customer activity in a Loan Request process map.

Activity	Due Date	Target Firing Date	Escalation Process
Notify Customer	12.00.00 28.09.2012	-1 day	Loan Application
Notify Customer	12.00.00 28.09.2012	0 day	Loan Application
Notify Customer	12.00.00 28.09.2012	+2 days	Loan Application

- If the Notify Customer activity becomes pending at 12.00.00 26.09.2006, the trigger executes on the following dates.

A	27.09.2006 at 12.00.00 - when the trigger firing target duration is -1 day
B	28.09.2006 at 12.00.00 - when the trigger firing target duration is 0 day
C	30.09.2006 at 12.00.00 - when the trigger firing target duration is +2 days

- If the activity is completed after the first trigger is executed, or after 27.09.2006 at 12.00.00, triggers B and C are not executed.

Predictive model

Predictive modeling is a statistical technique used to predict the likelihood of an outcome.

For example, the success of a sale may depend on certain factors, such as the value of a sale or a product type. Using a predictive model, you can analyze data from within a process and use the insight to prioritize tasks, and make decisions to achieve the optimal outcome for your business.

For example, in an insurance company a process is dedicated to selling insurance. From previous experience, the company knows the success rate is higher when younger males are targeted. To increase the chances of meeting the sales target before the end of quarter, the company defines a model to calculate a score that helps prioritize where the insurance can be sold successfully.

Each model consists of a number of variables (predictors) that are likely to influence the outcome, and the corresponding weighting and scoring to work out the statistical model. See [Manage a predictive model](#).

Example: To illustrate the use of a predictive model

1. Define three process variables: Score (Long), Gender (String) and Age (Long).
2. Create a model based on Gender and Age, to calculate score when the age falls between 25 and 30 years.
3. Define value/range and weight for the variables as given in the following table.

Note You can add variables multiple times and give a different weight depending on the value or range.

Process variable	Value/Range	Weight
Gender	Male	2
Gender	Female	1
Age	Less Than 25	4
Age	Greater Than 25 and Less Than or Equal To 30	3
Age	Greater Than 30 and Less Than or Equal To 50	1

4. Define the scoring system by creating a score rule as: $\text{Gender} + (\text{Age} * 2)$

Thus the score for a male, aged 26 is 8 and the score for a male, aged 18 is 10. This resulting score can be used in decision logic and work allocation rules to direct high-scoring insurance requests to the right reviewers, thus increasing potential revenue to the company.

Access

Configure availability and functional access of a process.

Available from and Available to

Allows the process to be activated or deactivated on a particular date.

If set, the process expires as soon as the active period is over. Otherwise, it remains active. For example, a garment retailer decides to implement a discount scheme for Christmas and creates a process map that begins at the start of the season and expires at the end the season.

Job creation form

If "Update process with associated form" was selected at the time of generating the Create new job form, then the name of the generated form appears in the Job creation form field by default. To associate a different Create new job form either select a different form or provide a static value.

Help text

Information about the process. The text can be added either as **Plain text** or as a **URL** to a web page.

Owner

An owner of the jobs created on a process. You can specify a process owner at design time. An owner is a static resource, which can be an individual resource or a group. Only one resource can be an owner at a time.

If you specify a process owner during process design, the owner of the job is set to that resource. Otherwise, the owner defaults to the resource that created the job.

The job owner can be used to dynamically assign resources to activities. You can also search for jobs belonging to that owner.

See [Assign resources by applying rules](#).

For example, in many organizations resources have the responsibility for jobs regardless of who, among them, performs or completes the work; the job owner functionality can give the owner resource visibility of jobs they are interested in.

The job owner can be changed at any time during the lifetime of a job by the current owner or the supervisor of the owner.

Note

- Importing or exporting a process from the Designer also imports or exports the process owner.
- When documenting a process, the process owner is also included.
- When you create or edit a skin, you can override the process owner defined in the template and therefore the job owner.
- Importing or exporting a skin also imports or exports the overridden process owners.

Functional access

See [Functional access](#).

Maintenance access

A resource with maintenance access permissions for a process map can add or delete resources or change the access rights of resources to maintain the system depending on the access types.

You can only assign maintenance access to one resource or group.

The maintenance access includes the following access types.

Option	Description
Full control	Users with this access type can modify the process, and also set and modify access permissions for other users. By default, Everyone group has Full control.
Read write	Users with this access type can modify the process, but cannot change access permissions.
Read	Users with this access type can only view the process; they cannot modify the process or set and change access permissions for other users.

Configure maintenance access

1. Click #.
2. On the **Name** list, select the individual or group for whom to set the maintenance access.
3. On the **Type** list, select the access type.
4. Click **Add**.
5. Save the process.

On release

You can set the process that can be used to delay the final release of this process until the changes are reviewed and approved. The process remains in awaiting state pending final release.

Default settings

Configure the default resources and notifications for activities at the process level.

Activity defaults

Specify default resources so that you do not have to add resources to each manual activity separately. Whenever a new activity is added to a process, the default resources are automatically added to that activity. The default resources can be individual resources, groups, roles or a combination of all.

By default, Everyone (Group) is the default resource to activities. To change the default resource, perform the following steps.

1. Click **Add**.
The **Add default resources** dialog box is displayed.
2. Select the required group, individual and/or process role.
3. click **Done**.

Activity notification defaults

An activity notification is a way of notifying a resource through email that work is ready in an activity and is pending in the queue. When a job is created on the process, an email is sent to the usable resources of the activity for which activity notification had been enabled.

You can set an activity notification for a process as well as an activity. When set for a process, any manual activities added thereafter inherit the settings. When set for an activity, the settings apply only for that activity.

You can create the content of the email, such as subject and body, and embed a URL in the email to take the user directly to the work. For example, set an activity notification on the Validate Loan Form activity that alerts a Banking officer to check the details on a loan application. A URL embedded within the email launches the relevant web page or job with the customer's details, so the officer can approve or reject the loan application.

Note An activity notification only works if the SYSTEM Process Email Activity process map is installed. See [System processes](#).

Set the following properties to configure the activity notification for a process.

Send email	If selected, allows to configure an email notification to be sent to resources when an activity becomes pending in the resource's work queue. (Default: Selected)
Send to	<p>Select either option to define the recipient of the email:</p> <ul style="list-style-type: none"> • Group and any assigned users or roles: Only sends email to the assigned resource group (not individual members within a resource group) and any additionally assigned resources. • Group members and any assigned users/roles: Sends email to each member within the assigned worker group and any additionally assigned workers. <div style="background-color: #f0f0f0; padding: 5px; margin-top: 10px;"> <p>Note</p> <ul style="list-style-type: none"> • Assigned resources and groups are usable resources allocated to an activity. • Email addresses are configured at the time of configuring a resource. See Create a resource and Create a group resource. </div>
Subject	<p>Set the subject of the email to be dynamic or static.</p> <ul style="list-style-type: none"> • To set a dynamic value, select the variable. • To set the subject as plain text, click # and type the subject of the email.
Body	The message of the email.
URL	A link to the location of the web page where the user can take and complete the pending activity.
Append associated file	<p>If selected, appends the name of an associated file to the URL.</p> <div style="background-color: #f0f0f0; padding: 5px; margin-top: 10px;"> <p>Note The Associated file path is configured under Inputs/Outputs tab of the activity.</p> </div>

Process variables

Allow variable prefixing to identify whether the variable is a process, case or server variable.

Select **Use variable prefix**.

The variables are prefixed in the following manner:

- A process variable is prefixed with p. Example: p_SessionId.
- A case variable is prefixed with c. Example: c_SessionId.
- A server variable is prefixed with s. Example: s_SessionId.

Case completion

In practice, several associated jobs may be running as part of a case. When a case is completed, it impacts the associated jobs. You can configure a case to define the flow of associated jobs on case completion; for example, kick off a separate business process to invoke a formal closing procedure.

You can configure a case to either terminate or to leave all associated cases (jobs) running upon case completion. For example, if a court decides that compensation must be paid to all case plaintiffs on completion of a legal case, then the legal case can be configured to keep the jobs alive so that arranging payments can be kicked off for each of the plaintiffs. If the jobs are terminated, plaintiffs are not paid.

Note All associated jobs must be completed before the case completion event is executed.

When a case is terminated, all jobs associated with the case are also terminated.

To configure case completion for a process, perform the following steps.

1. In the properties panel, select the **General** tab.
2. On the **Completion process** list, select the process to define the flow of associated jobs to either terminate or leave them running upon case completion.

Note To get information on the case job that raised the process, you must first create a Case Ref and then JobID as initialization parameters.

3. Select either option for **Associated jobs**:
 - **Leave**: Leaves all associated jobs of this case running. The status of associated jobs in this instance is Awaiting Case Completion. If the case is completed before the associated jobs are complete, the status of the case changes to Awaiting Completion.
 - **Terminate**: Terminates all associated jobs of this case. If a case is terminated before the associated jobs, all jobs associated with the case are also terminated; the status of the associated jobs changes to Terminated.

History, reporting and execution

Configure process to record history of data, and reporting and execution properties.

History

Record history

Records history of data, such as activity taken and completed. See also [Archive finished jobs](#).

Retain indefinitely

By default, the system retains the process indefinitely. You can retain the process for a specific period by defining the retention period. The jobs are automatically deleted once the retention period is over.

To retain the process for a specific period, clear **Retain indefinitely** and configure the retention period in years, months and days (default: 1 year, Minimum value: 1 day).

Note Deleting is a non-recoverable action.

You can also configure the retention policy at the system level.

See [Configure the retention policy](#).

Reporting

Include in analytics

Allows the data related to jobs for a process to be picked up by Kofax Analytics for TotalAgility reporting so that process data can be analyzed.

Reporting tag

Allows a reporting tag to be added to a process. This enables Kofax Analytics for TotalAgility to apply a custom filter on a report.

See [Reporting tags](#).

Capture process

Allows the process to be considered a capture process so that the data within Kofax Analytics for TotalAgility reports can be used to filter the data returned.

Execution

Thread pool

Thread pool to associate with the map so that the execution of a number of concurrent activities can be controlled. See [Thread pools](#).

Max loop count

Allows you to define the number of times an activity can be executed in a synchronous job or business rule (default: 1000).

Continuous looping in a synchronous job or business rule can cause high workload on the TotalAgility server. Maximum loop count helps in reducing the workload on the TotalAgility server.

For a process with automatic activity, the job creation fails if the permissible loop count is reached. For a process with a business rule node, if the Synchronous and Maximum loop count properties are set for the Business rule node but not on the map containing the Business rule node, the job gets created but gets

suspended when the permissible loop count is reached. A note is added to the job to reference the loop count being reached.

Note

- This property is not available for a case map.
- By default, the maximum loop count set at the system level is available for all processes. The loop count set at the process level takes precedence over the loop count set at the system level.

Allocation algorithm

Algorithm options for allocating work to resources:

First Found: Offers the activity to the first available resource (checks for those who are first in the waiting state).

Cost: Checks each available resource and offers the activity to the resource with the lowest cost.

Skill: Checks each available resource and offers the activity to the resource with the highest skill level.

Speed: Checks each available resource and offers the activity to the resource with the highest productivity rating (based upon the actual work compared to the expected work).

.NET assemblies

The .NET assemblies to associate with the process so that the process can use external assembly components.

Note

- On exporting a process, the .NET assemblies associated with the process are also exported.
- On importing a process from a version previous to TotalAgility 7.0, all the available .NET assemblies are imported. You can configure the assemblies that are required.
- When you view a system map, the process is updated with the associated .NET assemblies.

To add a .NET assembly, click **Add**, select the assembly and click **Done**. See [.NET assemblies](#) for more information.

Exceptions

An exception is a way of escalating to the user when a particular situation arises within the running of a process.

For example, an exception is raised if the system is unable to connect to a remote server to download important data, or if no resource is available to pick up a particular job.

You can handle an exception by assigning a process map as an escalation process. For example, configure an Insurance Premium Policy process to automatically send an email if customers do not submit their insurance premiums by the due date.

TotalAgility provides predefined exception-handling codes. Each exception code is a placeholder for a particular type of exception (process map). You can use these processes in your map to address unexpected events, such as throughput, capacity and workload changes, without manual intervention or process termination.

You must create the process map to run whenever the exception code is called. For example, the exception code EXP0001 is called whenever a resource has been inactive for an excessive period of time.

Some of the most frequently used examples of exceptions:

EXP0013—Activity Due: Triggers whenever an activity due date is passed.

EXP0005—Job Duration Overrun: Triggers whenever a user takes longer than expected to complete a job.

The maps associated with predefined exception codes belong to the following categories.

- **Workload exception maps:** These maps can handle business exceptions, such as costing or timing that run outside normal business tolerance, such as job duration overrun or activity overdue.
- **System fail exception maps:** These maps run when some element of the system process fails. For example, they might run if a connection cannot be made to a remote server to download information, or if a script object fails to execute.

You must assign variables as initialization parameters to track the source of an exception. See [Exception maps and initialization parameters](#).

You can configure exception handling at the server level. See [Configure exception handling at the server level](#).

A map assigned to an exception at the server level is, by default, assigned to that exception at the process level. You can override the default process map and select a different map for the exception. See [Configure exception handling for a process](#).

For more information on exception handling, see "Business calendar" in *Kofax TotalAgility Best Practices Guide*.

Process associations

A process map, variable, or a milestone may be used within a process or by a number of process maps.

For example, in a map, a variable may be used as an initialization parameter or as a dynamic expected finish time for a job. In an activity, it may be used as a dynamic resource variable or as an output parameter. Similarly, in a map, a milestone may be used in expected duration or as a relative milestone, and in an activity in the target due date or as a milestone to reach when an activity becomes available or completed. If you change or update any of these items for one process map, it may impact several others.

View an association to find out:

- Variables being used in a map or an activity.
- Processes being used in a current process.
- Processes that use the current process.
- Milestones being used in a map or an activity.

Associations provide visibility across the entire process map, helping you to manage and maintain your process maps more efficiently.

You can only view associations for a saved or released map.

Case definitions

A case definition is a complex workflow that can require user interaction and contain decision points, embedded processes, and fragments.

A case definition can involve several complex processes running across a number of departments and using multiple sources of information. For example, processing an Appeals case could consist of a wide range of documents or forms and numerous processes such as Registering an Appeal, Setting Up a Tribunal Session, Checking Medical Records, and Clearance of an Appeal. These business processes may run independently of one another, yet be related to the one case (Appeals).

A case process can contain a base case process used to support the overall case, as well as several normal processes or fragments, all of which are linked for collecting and sharing case-specific information.

Note A normal process and a fragment can be associated with a case, gaining access to all case-specific data such as milestones and roles.

You can set up and use the following for a case map:

- Milestones or key target dates such as a hearing date within 14 days of the initial registration date of an Appeal case.
- Roles (resources) to complete activities within a process such as Appeals Officer or Legal Representative in the Appeals case fragment.
- Variables to store information specific to a case. This information is then readily accessible and available to all fragments including the normal business processes associated with a case.

Note You can use milestones and roles for a normal business processes without using the Case Management functionality. See [Milestones](#) and [Manage roles](#).

Fragments

A case fragment is a sub-process that is initiated and used within a case process and cannot be used by other processes or cases. For example, a patient is represented as a case process and the diagnosis is considered as a case fragment. The diagnosis case fragment is completed if the patient takes the tests but the case process is completed when the patient is discharged from the hospital.

- A case fragment is similar to a process in that it has all of the attributes of a normal process such as nodes, data, SLAs and resources. However, a fragment is dependent on the case in which it is created and cannot be reused by other processes or cases.
- A case fragment inherits the properties of the case from which it is called.
- A case fragment has direct access to case elements such as variables and milestones.

For more information on fragment versus process, see "Fragment versus process" in *Kofax TotalAgility Best Practices Guide*.

Process versus case

Some key similarities and differences exist between a normal process and a case.

- The runtime instantiation of a case is a case fragment, which is similar to the relationship between a job and a normal business process.
- A normal business process (which is based on a Process map) runs through a set of steps in a specific, fixed order from start to finish.
- A case has a base process that gives a general flow to what must be achieved but does not necessarily execute in a logical start to finish fashion. It is tied to the case information through a case ID and not a process map.
- A fragment can be kicked off at any point in the lifetime of a case; therefore, it is not tied to a specific starting point in the process or to a process map.

For more information on case versus process, see "Case versus process" in *Kofax TotalAgility Best Practices Guide*.

Document processes

You can generate a design document for a process map.

The document details all the information input during design, such as resources, activities and associated parameters.

You can generate a design document for a particular version of a process map.

Business rules

Business rules can be used to build complex business logic without programming, and automate and optimize business decisions.

For example, a store offers the following discounts:

- 5% for purchases between £100 and £1000
- 10% for all purchases above £1000

You can use the following logic to calculate the amount to pay after discount:

```
IF Amount >=100 and <=1000 THEN Discount =5%
IF Amount > 1000 THEN Discount = 10%
Else Discount = 0%
Amount to Pay = Amount - (Amount/ 100) X Discount
Return Amount to Pay
```

A business rule is a diagrammatic representation of a rule and enables you to use all of the backend integration capabilities of TotalAgility to retrieve data from external sources to use within the rule. A business rule also enables you to use the decision and multi-branching rules logic of a process map to create the rule and determine the output values.

A business rule includes the following elements:

- Inputs
- Rule Conditions
- Output

You can create, copy, modify, delete and unlock business rules. You can also view, unlock and delete a business rule version, and revert to a previous version of a business rule.

For more information on business rules maintainability and testing , see "Business rules" in *Kofax TotalAgility Best Practices Guide*.

See also:

- [Create a business rule](#)
- [Modify a business rule](#)
- [Copy a business rule](#)
- [Delete a business rule](#)
- [Open a business rule version](#)
- [Unlock a business rule version](#)

Skins

Business Process Outsourcing enables organizations and Shared Service Centers that have several core processes to have many views of the same process typically for different products and customers.

When processes have the same structure but different rules on resourcing, SLAs and others, then skins allows you to create different variants of the process without having to manage and maintain separate copies of the process. This greatly reduces the maintenance overhead and allows changes to the template to be immediately reflected across all skins.

For example, if for a gold customer, the process needs to be completed in one day and for the silver customer it needs to be completed in two days, OR if the process is critical, it must be routed to a specialized group, otherwise to a general group, then you can create two variants of the same process.

Templates

A process can be marked as a template. Once set as a template, you can create skins on it. Any changes to the template are automatically applied to each skin.

Note Skins always apply to the latest version of the process.

Within a skin you can override the properties of process, variables and activities.

Tip If there is a part of the process that might require structural change, you can achieve this by using embedded processes, as the embedded processes can be overridden in a skin.

Rules

Skins are invoked based on the defined skin rules. For example, for a gold customer gold skin is used, and for a silver customer silver skin is used.

When a job is created on a template, the rules are evaluated. In case of multiple versions of skin, the job must be created on the latest active version of skin. The first rule that evaluates to true uses this skin, and any overrides set for the skin are used. If the rule does not evaluate to true on this skin, it moves to the next skin and so on until the rule is passed. If no rule evaluates to true the process continues without any overrides.

During the lifetime of a job, the skin can be reevaluated. For example, when the data changes, this could potentially invoke a different skin or no skin.

See also:

- [Process template](#)
- [Create and customize a skin](#)
- [Manage skins](#)
- [Skin versions](#)

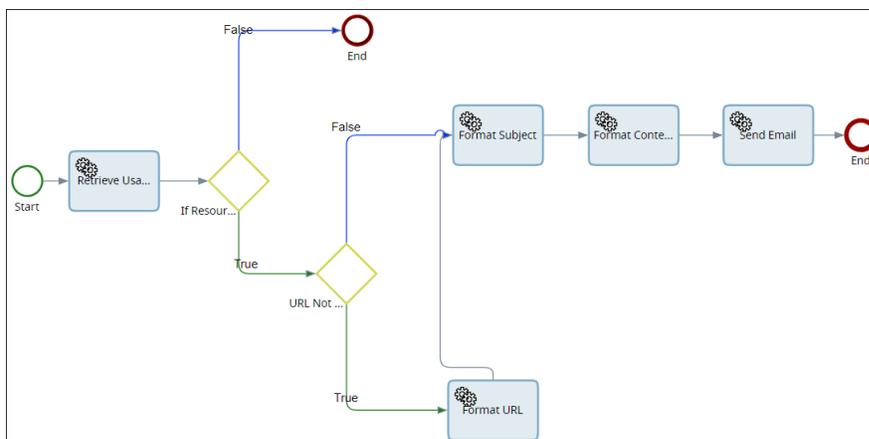
System processes

A number of fully customizable system processes are installed with TotalAgility on-premise to support features in the product.

Note On upgrading TotalAgility, you must manually import the SYSTEM maps.

System Process Email Activity

Use this map to process email notifications when activities are pending.



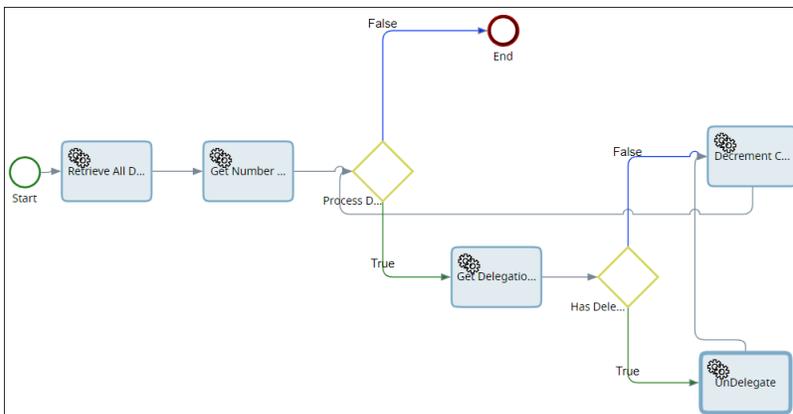
The server variable `SYSTEM_EMAIL_FROM` is imported into the system with this map. Update the default value with the email address of the user who sends the email notifications in your organization.

Use the email node to specify whether to send an email to all usable resources when an activity becomes pending. Define the structure of the email including the subject, content, and a URL for an ASP page that takes and completes the pending activity.

Note Ensure that you generate this ASP page. Place this ASP page in the following folder `C:\inetpub\wwwroot`.

SYSTEM Check for Completed Delegations

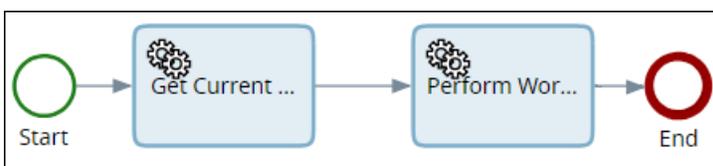
Use this map to remove redundant work delegation rules after their end date has passed.



A scheduled job is run on this map each night at one minute past midnight to check for and delete redundant delegations.

SYSTEM Perform Auto Work Allocation

Use this map to allocate `AwaitingAllocation` activities for the current day to appropriate resources with `AutoWorkAllocation` debits.



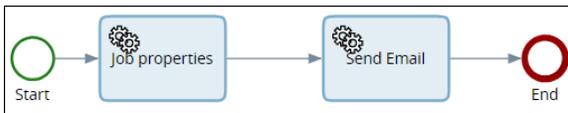
SYSTEM Reset Quantity Counts

Use this map to reset all checking and sampling counts to zero.



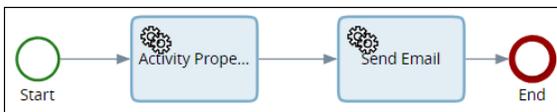
SYSTEM Job Duration Overrun

This is a sample exception map.



SYSTEM Activity Overdue

This is a sample exception map.



SYSTEM Active Directory Synchronization

Use this map to synchronize the Active Directory (AD) resources with TotalAgility. This map synchronizes organizational units and their associated groups and users within the Active Directory; it does not synchronize any containers, objects, or users outside of an organizational unit.

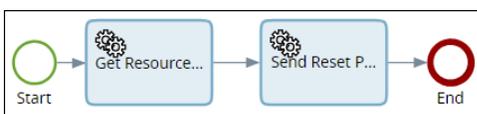
Note

- TotalAgility Active Directory synchronization is passive. It cannot add, update or delete anything in Active Directory. As an added security measure it obfuscates the Object ID from Active Directory to store it as a Resource ID in TotalAgility (HEX conversion). You cannot locate the same resource in Active Directory even from the Resource ID from TotalAgility.
- TotalAgility Integration server does not support Active Directory Synchronization system process.

See [System Active Directory synchronization](#).

SYSTEM Reset Password

Use this map to send an email to the user email address to reset password.



Save and release processes

Once you complete the design of your process map, you can save or release it. You can only start a job based on a saved process map, if you have a development license.

- Saving the map saves map changes and creates a minor version of the map, such as Get Customer Details v0.01.
- Releasing the map saves and releases the map, and creates a major version of the map, such as Get Customer Details v1.0. You can only use a released map in production.

You can control the release of a process using the OnRelease event. To handle the release, you can:

- Create a new process, such as Approve Loan Application Release process.
- Add activities to the event handling map to take whatever steps are required before the map can be released, such as notifying someone or getting approval.
- The event handling map must release the map after the release business logic is completed.

Note Use an API call to the ReleaseProcess method available in ProcessService SDK.

Revert and delete processes

You can revert a process map to a previous version and also delete processes.

Revert processes

Revert a process map to create a new version of the map based on an earlier version. All the items including variables, activities, resources, properties, and skin rules of the selected version are available in the newer version. For example, in a management scenario, as part of the company's project plan, you might have altered the organization's hierarchical structure, resource managerial levels, their categories and also the process map design. Then saved and released to create a new version of the map and immediately put it to use. However, after few days of implementation, management analyses the performance and opts to revert to the previous resource hierarchy and process flow. You might then want to pick the earlier map version and replace the current version.

Delete processes

You can delete latest or specific versions of processes. When you delete specific versions of the process, the selected version and all the previous versions are deleted. For example, if you delete version 3, then version 1 and version 2 of the process are also deleted.

Monitoring

Changing business conditions make it important to recognize trends and patterns in your business performance for proactive and informed decision-making.

Business events are key events that business users monitor and manage, such as case open, sale made, sale lost, and claim settled. A business uses events to monitor performance against targets. For example, you define a Sales event that records the name of the salesperson and the total sale amount. When the salesperson completes a sale, the system fires the event, which is in the sales processes.

Each salesperson in a team could have different quarterly targets. You can create a business target for each salesperson, based on the Sales event, and monitor the event every quarter. In the target value, enter an amount as the goal for the salesperson, and in the filter criteria, use their name. Repeat this for each salesperson to configure a business target for each one.

You can define business alerts to notify the system when the sum or occurrence of an event reaches a specific value. For example, for a Sales event, create an alert that runs when a salesperson reaches double their target. The alert can create a job to send a congratulatory email.

Kofax TotalAgility can monitor targets and automatically initiate business processes if thresholds are missed.

A process, form or a business rule can initiate these events.

You can associate the event with an activity, and also export and import business events, targets and alerts.

See also:

- [Events](#)
- [Alerts](#)
- [Targets](#)

Business events

Use business events to monitor business performance, either independently of processes, or through a process that initiates an event.

See [Manage business events](#)

Business alerts

A business alert is an automatic action that occurs when a target threshold is met.

The alerts are business processes that can be as simple as an email interaction, or as complex as a change to operational parameters.

See [Manage Business alerts](#).

Business targets

Business target is a goal against which you can monitor a business event's performance.

It defines how a business monitors the collection of key business events.

See [Manage Business targets](#)

Chapter 4

Model the user interface

TotalAgility lets you model forms that provide the user interface to support your processes. You can manually create forms, build forms based on business processes and preview forms.

You can also create mobile and tablet versions of forms and make forms touch enhanced.

Generate forms automatically

Create forms automatically to include TotalAgility functionality without the need to design them. These forms contain the appropriate controls and actions to support your solution.

The following forms are available to generate automatically.

Create new job form

Controls are added for all initialization parameters and the Create New Job event is configured.

Activity form

Type-specific controls are added for input and output parameters for the activity along with the Take activity, Complete and Cancel activity events.

Multiview form

A multiview form enables users to view different forms without navigating away from the primary form. A multiview form works like a container that shows other related forms within it. A user can switch between the pages of a multiview form using a navigation menu. Switching between pages preserves the state of the page. When a user navigates back to a page using the menu item, the page appears exactly as the user left it.

Multiview activity form

A multiview activity form allows you to display a primary form and navigate to other forms while maintaining context. Use this form to build forms for multiple activities and to display those forms with additional content using a navigation menu.

Work queue form

A custom work queue form with the display detail or work type specified.

Logon form

A custom logon form generated automatically without creating an external web page that you then redirect to your site. This form can use Windows Authentication, Federated Security or manual logon.

A logon form using Windows authentication or Federated Security uses the ID of the user who is logged on for authentication. A logon form that uses manual logon requires the user to enter a username and password (optional).

Folder form

A folder form is a customized view of a folder. Using a Folder form, you can generate Scan, Validation, Verification, and Document Review forms for a folder type. A folder type can have more than one form. However, a folder type can have only one of each form type.

Document form

A document form is a customized view of a document. Using a Document form, you can generate Scan, Validation, Verification and Document Review forms for a document type. A Document Type can have more than one form. However, a Document Type can have only one of each form type.

Scan create new job form

A Scan create new job form not only creates the job but also enable documents to be scanned and associated with the job.

Device create new job form

A Device create new job form provides all the capabilities of the scan create new job form only for use on a mobile device or MFP.

The following MFP forms are available to generate automatically.

Note The MFP forms can be accessed only from Lexmark MFP devices. Only Tablet version (default) of the forms can be created.

Work queue form

A custom work queue form with the display detail or work type specified. This form displays only the MFPfriendly activities.

Scan take activity form

The Scan take activity form allows to add type-specific controls for input and output parameters for the activity along with the Take activity, Complete and Cancel activity events. This form can only be generated for MFP-friendly Scan activities.

Scan create new job form

A Scan create new job form allows to scan documents and create jobs on MFP-friendly Scan activities.

Manually create forms

Create forms manually if you want full control over the layout and functionality to be included within it.

Creating a form manually gives you more control and flexibility over the resulting Windows when compared to those created automatically. To save time and effort, plan your form design before creating a new form.

- Insert a table framework before adding controls to the form.
- In the framework, include rows, columns and cells for organizing and arranging form content.
- Include sections and controls.
- Include logos, and other types of graphics.
- Supply a label for a field even if you are not showing the label on the form. Labels help end users know which form fields have failed validation.

Refer to the "Solution building > Building forms > Design guidelines" section in the TotalAgility Best Practices Guide.

You can create a Desktop, Phone or Tablet version of the form with the additional option of making the phone or tablet touch enabled so that the user experience can be customized to suit each device.

You can switch between form types if they exist. If a particular type of form does not exist, switching to that icon creates a blank version of the form. For example, if you switch to phone icon, and if that form does not exist, a blank version of the phone form is created.

You can create a custom form for use on a Multi-Function Peripheral (MFP) Lexmark device. You can only create the Tablet version (default) of the MFP form.

See also:

- [Create a form](#)
- [Create an MFP form](#)

Form elements

Define the layout of a form, and add controls to it.

You can enter information into a form by typing into text boxes, selecting items from a list, selecting check box options and performing other actions. The objects with which users interact are called "controls".

Some controls, such as buttons, allow you to execute an event that performs an action. For example, clicking a button at the bottom of a form can save the input information to a database.

In some controls (on all forms), the input element's name is not populated and using methods that rely on the underlying DOM may cause issues. In such cases, you must use Ext APIs, such as `Ext.getCmp()` to access the controls. For example:

```
var myCheckBox = Ext.getCmp('checkbox1'); "
```

Form elements include basic layout elements: columns, rows and cells, and general and advanced controls that help in designing your user interface.

Layout

Columns, rows and cells help in arranging your form content.

Column

Use columns to divide a form vertically into equal parts. For example, if you add one column, the form is divided into two equal parts; if you add two columns, the form is divided into three equal parts.

Row

Add rows to horizontally divide the form into panels.

Cell

Add cells to create sections in a form.

General controls

TotalAgility supports the following basic form controls.

Label

Use a Label control to add descriptive text to a form.

Textbox

Use a Textbox control to create a text field where a user can enter information on the form. Also use a text box to display information, such as the result of a formula or the current date.

Button

Use Button controls to allow users to perform actions, such as submitting a form, querying a database or approving a loan.

Button controls have a predefined set of events that can be invoked when a user clicks a button.

Checkbox

Use a checkbox control to select a particular option from a number of independent choices.

Table

Use a Table control to organize and arrange information or data into rows and columns.

Dropdown list

Use a dropdown list to ensure that the data entered is valid and to help the user complete a form with the responses that the designer intended.

A drop-down list contains a set of predefined (and usually common) options that can be static (hard-coded), retrieved from a table that is bound through a data connection to a table in a database, retrieved from a lookup or redirected from another form.

Calendar

Use a Calendar control to help users enter correct and valid dates.

Radio button list

Use a Radio button list control to present multiple options that are mutually exclusive and from which the user must select only one. For example, in the Marital Status radio button list, if the Married radio button is selected, the Single, Divorced and Widowed radio buttons are cleared.

Tab

Use a Tab control to group related information on a form. You can configure multiple tab controls on a form and have multiple tabs in each Tab control. Saving an individual tab control saves all tab details.

To manage the data displayed on a tab, use the OnTabLoad event for a tab in a Tab control. The OnTabLoad event ensures that the data displayed on the tab at runtime is the data entered in other controls for that tab. The event also optimizes the performance of form loading, because the events are only triggered when the user clicks the relevant tab.

Note The events are triggered only once when the user clicks a tab for the first time and not on subsequent clicks. However, events on the first tab of a Tab control are triggered when a form loads because the first tab is loaded and displayed along with the form.

Hyperlink

Use a Hyperlink control to provide a link to a URL on a form. For example, a form displaying information about a list of products can include hyperlinks to other web pages displaying more information about those products. Hyperlink controls can point to any web server on the intranet or Internet.

Image

Enhance the look and feel of your forms by adding icons and images to a form or to buttons on a form.

See [Button control](#).

Chart

Use a Chart control to add charts to a form, and create a visual representation of data returned from a query. The chart displays a count of items grouped by fields and a total count of items.

Note The Chart control is available for Touch and Non-touch forms, but is not available for MFP forms.

List

Use a List control to show a list of items with swipe options on a phone and tablet. You can add multiple List controls and display them side by side by adding them to multiple columns of a form. A List control is only available for a touch-enhanced Phone or Tablet form; it is not available for a desktop form.

Horizontal rule

Use a Horizontal rule control to enhance the look and feel of a form and denote a change of context. Using Horizontal rules, you can draw lines across the screen to separate sections of a page.

Capture controls

TotalAgility provides the following capture controls:

- Text field
- Check box
- Combo box
- Table

You can open a capture form in design view and configure these controls.

Mini-viewer

Display a mini-viewer for a capture field on a Document form to quickly view a portion of the image related to the field. When you choose to show a mini-viewer for a capture field in a Document form, an additional control is added to the selected capture field.

Note The mini-viewer is not available for a capture Table control.

Advanced controls

TotalAgility supports the following advanced form controls.

<ul style="list-style-type: none"> • Job list • Work queue • Workload • Document set • File upload • Resource tree • Embedded page • Process viewer • Web capture • Thumbnail viewer • KCM 	<ul style="list-style-type: none"> • Case health • Checklist • Language selector • Custom action button • Toolbar • Create new associated job • Summary • Job action button • Activity action button • Mobile capture • Mobile barcode capture
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Note A phone or tablet form with the Touch enhanced property only supports the Embedded page and File upload controls.

Activity action button control

The Activity action button control provides a predefined set of actions that can be performed on an activity.

It is displayed as a button with an associated dropdown menu. Each menu item represents an action you can perform.

Note An Activity action button control applies to desktop, and non-touch mobile and tablet forms.

See [Properties of a Activity Action control](#).

Case health control

The Case health control displays the key details of a case and illustrates the overall case status and case progress.

Use a Case health control to view the status of other processes. To do so, pass the jobID for a normal process or fragment into the case health control. When you set the Case/Job ID, at runtime the current state of the selected case or job appears as shown in the image below.

The screenshot displays the Case Health control interface. On the left, a red banner indicates '10 Days Overdue' with a clock icon. Below it, a progress indicator shows '0%' completion. The main area is divided into three sections: 'PROPERTIES', 'STATUS', and 'OVERDUE'. The 'PROPERTIES' section lists details like Case Ref, Case Type, Created On, Case Owner, and Created By. The 'STATUS' section lists Expected Finish, Open For, Time Spent, State, and Status.

PROPERTIES		STATUS	
Case Ref	A9D15B68933F11E99FBD28D244E4F505	Expected Finish	20/06/2019 10:42:06
Case Type	karen Case Def 2	Open For	1d 5h 25m 60s
Created On	20/06/2019 10:42:06	Time Spent	0d 0h 0m 0s
Case Owner	Karen.McGeady	State	
Created By	Karen.McGeady	Status	Active

The Case health control appears on the Case Details page of TotalAgility.

To load the case health of a case, map the Case Job ID in the control properties.

See [Properties of Case health control](#) .

Checklist control

Use a Checklist control to display a list of items to guide inexperienced users through each step in a task.

Use the control in conjunction with sampling and checking for quality purposes.

See [Properties of a Checklist control](#).

Capture Composite control

A composite control is automatically added to a capture form when it is generated.

A capture form is generated based on one or more capture activities of the process map.

See [Properties of a Capture Composite control](#).

Create new associated job control

Use the Create new associated job control to provide a list of processes relevant to the current job (fragments and associated processes) that can be invoked to initiate an associated job.

See [Properties of a Create new associated job control](#).

Custom action button control

Use the Custom action button control to create a button that provides a dropdown list of options or an image list of options.

This button can be used on a form or within a table on a form. Each option can perform action configured against it. The Custom action button control is available for desktop, phone and tablet (non-touch) forms.

Tip For touch, use the existing Show action menu action.

See also:

- [Properties of a Custom action button control](#)
- [Configure a Custom action button control on a form](#)
- [Add an Action list to a table column](#)

Document set control

Use the Document set control to allow an administrator or customer to have appropriate views and perform operations on the document types and associated documents within the document set.

The Document set control displays the document set at runtime with details of the document types and the documents received.

The control has an event type called DocumentSelected which populates the document type, document ID, if a document is selected and just the document type if a document type is selected.

See [Properties of a Document set control](#)

Embedded page control

Using the Embedded page control, you can embed an external web page (through a URL), or an existing form, or an insight view within a form.

At runtime, when the site is loaded, the embedded web page is automatically opened, enabling you to view multiple pages at the same time.

See [Properties of an Embedded page control](#).

File upload control

Use the File upload control to browse and upload single or multiple files to the document repository or a specified location in the TotalAgility server.

Note

- By default, the maximum file size that you can upload is 2GB. To change the maximum file size, edit the web.config file. See [Change the size limit for uploaded files](#).
- When running in an on-premise multi-tenant or Azure environment, you can only upload files to the store; you cannot provide a file path.

Configure the properties as required. See [Properties of a File upload control](#).

Job action button control

A Job action button control provides a predefined set of actions that can be performed on a job or case.

The Job action button control is displayed as a button with an associated dropdown menu. Each menu item represents an action you can perform. The list of actions to display is configurable.

No events are available on this control; therefore, you cannot directly associate it with actions.

Note A Job action button control applies to desktop, and non-touch mobile and tablet forms.

See [Properties of a Job action button control](#).

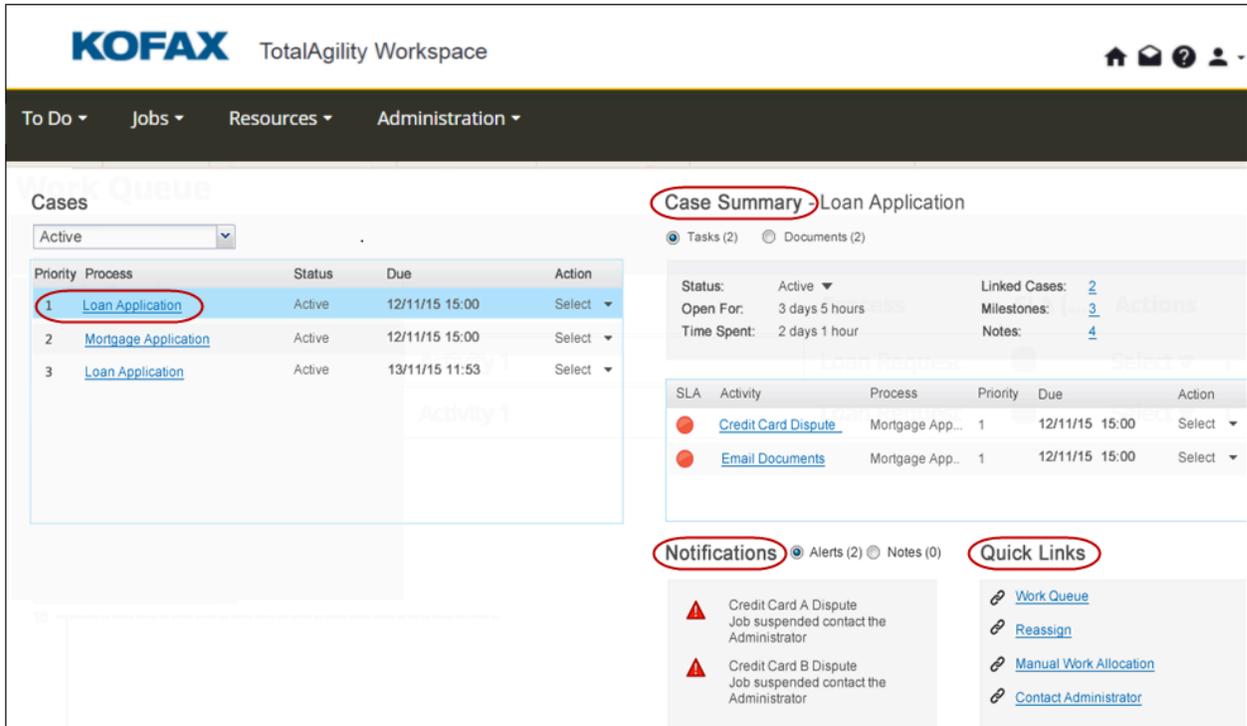
Job list control

Use a Job list control to allow a user to view, search and perform operations on jobs in TotalAgility.

Configure the control to show a predefined query or enable the user to select and modify the query used to populate the list. You can use a Job list control within forms to display jobs with associated information. The properties and metadata to display are configurable as are the actions to perform. The Job list control has an exposed RowSelected event, enabling the form designer to take additional job-related actions based on the selected jobs.

When one or more jobs are selected, the SelectedJob/SelectedJobs, and SelectedCase/SelectedCases properties are populated accordingly. To provide multi-select capabilities, ensure that you select the Multi-Select property checkbox on the control.

In the following example, select the Loan Application case to display the corresponding Case Summary. You can also view Notifications and open links to other associated pages, such as Work queue.



A user can perform tasks on a single job by selecting an action on the job row; or perform tasks on multiple jobs or cases at once by selecting an action in the table header.

The following table lists the tasks that can be performed on jobs or cases using a Job list control.

Action Name	Description	Single / Multiple Jobs or Cases
View job	View the job properties for the selected job	Single job
Add note	Add a note to a job	Single job
Activate	Activate jobs	Multiple jobs and cases
Suspend	Suspend jobs	Multiple jobs and cases
Terminate	Terminate jobs	Multiple jobs and cases
Recover	Recover jobs	Multiple jobs and cases
On-hold	Place the job on hold	Multiple jobs and cases
Change owner	Change the owner of a job	Multiple jobs and cases
Change state	Change the state of a job	Single job
Re-evaluate skin	Re-evaluate skins in jobs	Multiple jobs and cases
Re-evaluate score	Re-evaluate scores in jobs	Multiple jobs and cases

Action Name	Description	Single / Multiple Jobs or Cases
Re-evaluate preconditions	Re-evaluate preconditions in jobs	Multiple jobs and cases

KCM control

Use the KCM (Kofax Communication Manager) control to interactively generate documents in KCM through a Kofax TotalAgility form. To include any previously collected data, you should initialize the control with the data backbone variable from your process.

For example, you can add a manual activity to a process with data backbone variable as the input or retrieve the backbone variable using the GetJobVariable API in a standard form.

A KCM control has the following modes of operation:

- **Compose:** Create a document based on the selected template from a document pack, document template or a template from a letterbook (the end user selects the template at runtime). See [Compose mode](#).
- **Rerun:** This mode displays the control in a rerun mode. You can modify the previous selections and the documents in the pack is updated on rerun. See [Rerun mode](#).
- **Review:** Displays the control in read-only mode to allow reviewing generated documents. Configure a KCM control in review and re-run modes. See [Review mode](#).

Using the KCM control, you can distribute documents through the KCM server based on the distribution mechanism such as email or print.

Note

- You are allowed to add only one KCM control to a form.
- KCM control is not supported on touch enhanced phone and tablet forms.
- TotalAgility does not support SignDoc for the KCM control.
- For KCM proxy installation, see the *Kofax TotalAgility Installation guide*.

See also:

- [Properties of a KCM control](#)
- [Configure a KCM control](#)

Language selector control

Use the Language selector control to control the language in which to display the form.

At runtime, when the page with the Language selector control loads, the list is automatically populated with languages supported by the site, allowing you to manually select the display language to use.

To access the current browser language from within the site, you can manually create a Language global variable and use it in the Language selector control.

See [Create a global variable](#).

The Language variable can be used in all actions such as Same Page, Begin and others. For example, you could create a form with a drop-down list from which a user can select their language, such as

Spanish. You could then use the LANGUAGE variable to configure a Same page action on a button to display the calendar in Spanish.

See [Properties of a Language selector](#).

Note A form can have only one Language selector control. If a form has multiple Language selector controls, unexpected behavior occurs and the selected language is not set at runtime.

Mobile capture control

Use a Mobile capture control to capture an image.

Using this control, you can capture an image to:

- Add it to an existing document.
- Create a new document in a new folder.
- Create a new document in an existing folder or subfolder.

Any document created with this control can be used as part of a Document review activity or a validation activity.

Note This control is only available for a phone or a tablet form, which is NOT touch enhanced. It only works when viewed on a phone device in conjunction with the Mobile SDK. If you try to use this control without the SDK, for example, view the form by browsing on standard browser the control does not work.

On adding this control the following buttons are added by default:

- **Accept:** Allows the captured images to be processed.
- **Reject:** Rejects the captured image and retakes it.
- **Done:** Lets the user know that the images are complete.

See [Properties of a Mobile capture control](#)

Mobile capture barcode control

Use a Mobile capture barcode control to capture a bar code and make the value available for use within a job.

You can only add one instance of the control to a form. When a bar code is detected in the camera viewfinder, the bar code value property of the control is populated and an event is raised. You can then use the value as needed, for example, to pass into a CompleteActivity call.

This control is only available for a phone or a tablet form, which is not touch enhanced. It only works when viewed on a phone device in conjunction with the Mobile SDK. You cannot use this control without the SDK. For example, when you view the form by browsing on standard browser, the controls do not work.

Note The event will only fire if a bar code is found.

See [Properties of a Mobile capture barcode control](#).

Process viewer control

The Process viewer is also called the "Job viewer".

Note The Process viewer control is not supported for touch-enabled forms.

The Process viewer control serves two purposes:

- Displays the runtime view of the progress of a job (a live instance of a process) highlighting the path taken and the status of the various nodes. Key information is available on each activity, and each activity is outlined in a specific color representing the current status. With appropriate permissions, a number of live properties can be changed on the job. To use the control in this manner, a Job ID must be supplied.
- Displays the design of a process version outside of the standard design environment. With appropriate permissions, a number of operational properties can be changed. To use the control in this manner, a Process ID must be supplied along with an optional version number.

Note If no version number is supplied, the latest version of the process appears.

See [Properties of a Process viewer control](#).

Resource tree control

Use the Resource tree control to enable resource selection.

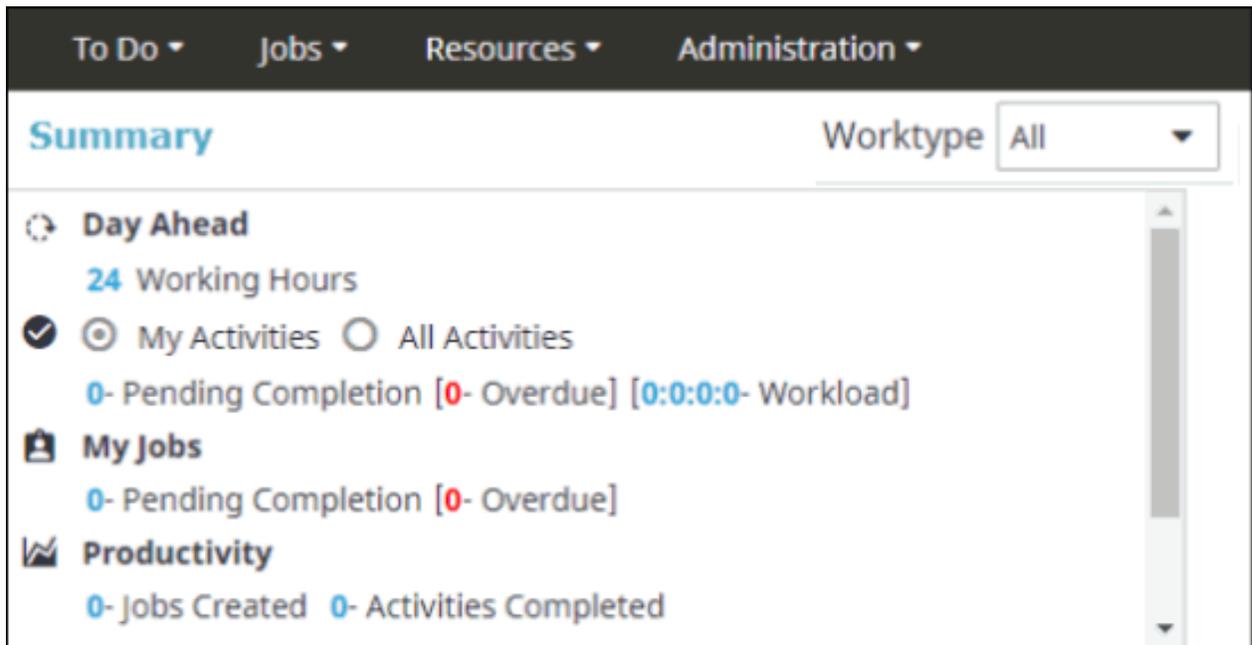
Configure the properties as required. See [Properties of a Resource tree control](#).

Summary control

The Summary control provides an overview of the day ahead for a resource.

Use this control to display the following details:

- A summary of planned hours: Working hours based on a calendar or work pattern, and any debits and credits for the current day.
- Activity status: All pending and overdue activities or the pending and overdue activities for yourself, and the workload.
- Jobs: All pending and overdue jobs for which you are the owner.
- Achievement status: Number of jobs created and activities completed, and the time spent on activities.
- Notifications: Number of alerts and any unread resource notes.



See [Properties of a Summary control](#).

Thumbnail viewer control

Use the Thumbnail viewer control to display the thumbnails for the documents that are loaded in the Web capture control.

When you navigate to a page in the Web capture control, the corresponding page is highlighted in the thumbnail view and the control also displays the difference between a selected and currently viewed page.

Note

- You can only add a single Thumbnail viewer control to a form.
- You can only use a Thumbnail viewer control with a Web capture control in a form.

See [Properties of a Thumbnail Viewer control](#).

Toolbar control

Use the Toolbar control to group buttons in one control.

This control is available for the desktop, phone and tablet forms. You can define the buttons in a hierarchy, separators and spacers that appear on the toolbar. Each button can have both text and image, or only text, or only image.

See also:

- [Properties of a Toolbar control](#)
- [Configure items for a Toolbar control](#)

Web capture control

Use a Web capture control to create, scan and view documents.

Using a Web capture control, you can do the following:

- Create multi-page documents.
- Create a new document in a new folder.
- Create a new document in an existing folder or subfolder.
- Scan and view a document. Use the document ID to view the document.
- Specify the type of a newly created document or folder.
- Add new pages to an existing document.

Note The control lets you add new pages to an existing document but does not let you replace the document.

- View all the pages of a newly created or existing document.
- Delete pages that have been incorrectly scanned.
- Selectively hide specific buttons at design time and only display the selected ones at runtime.
- Undock the image or document viewer from the main form and display in a separate browser window so that it can be viewed on a second monitor.
- Permanently alter the image, so that you are able to remove sensitive information that should not reside in your database.

Note The Web capture control is not supported on touch enhanced phone and tablet forms.

See also:

- [Properties of a Web capture control](#)
- [Configure a Web capture control](#)

Work queue control

Use a Work queue control to provide users a means of selecting and completing work.

You can configure the control to either show a predefined query, or select and modify the query used to populate the list.

Note Work queue control is not supported on touch forms.

See [Properties of a Work queue control](#).

Workload control

Use a Workload control to view the results of a system query.

The query helps you to view the workload for automatic and manual tasks so that you can take actions to avoid delay in processing the tasks and improve performance.

When you view the Workload control at runtime, only system queries are displayed in the Queries panel. The list of queries is displayed based on the selected query.

Note Workload is not supported on touch forms.

See [Properties of a Workload control](#).

Form initialization

An initialization variable is any process variable for which a value should be provided when the job is being created; the order of the initialization variables is configurable within the Designer.

Create new job forms provide appropriate controls for the initialization variables and the corresponding Create new job event.

When creating a job through a process map, variables can be consumed for the initialization variables.

Form events and actions

A form and each control on a form have a predefined list of events into which you can consume actions, allowing the designer to react to a user action.

For example, you can retrieve a list of states or counties based on the selected country, or save an order when the Submit button is clicked.

Form actions

Actions describe different ways to initiate an event. For example, you can base a customer credit score check on two different actions:

- DB query action that reads customer details from a database
- .Net method action that calculates the appropriate score

You can configure multiple actions that execute upon an event firing on a form or form control, such as a form load, button click, or selection of a table row.

For example, in a Loan Application form, you can create DB query, Web service, and Redirect actions on the Credit Check button so that when the button is clicked, the actions are executed in sequence:

- Retrieve customer details (DB query action)
- Get credit score for customer (Web service action)
- Take the user to the next relevant form (Redirect action)

Note If an action fails, a message appears and no further actions are called. For example, if the Login fails the user is not redirected to the Work queue page.

Tip

- To reduce maintenance complexity and cost, make sure that no event fires more than 10-20 actions.
- Use clear display names for actions that reflect their purpose; you cannot change the names once created.

Action types

TotalAgility supports the following actions for a form or form control.

Action	Purpose
.NET method	Call an API for performing actions, such as creating a new job.
Add row	Add a row to a table.
Alternative extraction search	When added to a document validation form, performs an alternative extraction search in a validation activity.
Apply form variant	Apply the latest version of the form variant; the state and label text defined when creating the variant is reflected at runtime.
Apply validation	Validate the available controls on the desktop, phone and tablet forms.
Begin condition	Begin the conditional action.
Business rule	Use a predefined business rule.
Calculation rule	Calculate a field value.
Change stack order	Change the stack order value or remove or move an element towards the bottom of the stack.
Clear	Clear the specified form variables and fields.
Clear selection	Clear the selections of a table or dropdown list.
Close	Close the currently opened form or pop-up window.
Composite	Include multiple actions for use on multiple controls.
DB query	Access a database to view, insert, update, or delete records.
Delete row	Delete a row from a table in a form.
Display rule	Invoke a form's display rules and automatically change display states, based on what the user enters into the form.
Else condition	Make form actions more flexible and easier to read. At runtime, all the actions within the Else condition are executed if the Begin condition is not met.
End condition	End the conditional action.
File upload	Upload a file on a form at runtime.
Fuzzy search	Find strings that closely (but not exactly) match a pattern in a "fuzzy" database, which is a single table or view exported from a relational database. Note The Fuzzy search action is available only for a document validation form.

Action	Purpose
Hide action menu	Conceal a menu when a touch-enhanced Phone or Tablet form is opened on a touch-enhanced device.
JavaScript	Give access to the Document Object Model (DOM).
MFP print	Download and print the document on an MFP device.
MFP scan	Scan a document using an MFP device. Note The Scan action is available by default for the MFP Scan create new job and MFP Scan take activity forms.
MFP scan settings	View and modify the scan settings on an MFP device.
Redirect	Redirect to another form or a pop-up window.
Refresh capture	Refresh the capture forms (Scan, Verification, Validation and Document review) and capture take activity forms to prevent the job with invalid fields being completed.
Refresh page rendition	Refresh page renditions on a form and accordingly enable or disable rendition buttons at runtime.
Reset form variables	Reset the data of one or more form variables.
RESTful service	Integrate the form with external applications.
RPA	Execute the RPA Robot from within a form.
Same page	Retrieve the required data on the same page.
Set device	Switch the form factor (Desktop, Phone or Tablet) between a desktop, phone or tablet form.
Set focus	Set the focus on a form control.
Set language from Job	Set the form language to the language of the job when the page loads.
Show message	Alert or prompt a user or request confirmation from a user.
Show action menu	Display an action menu from the list of multiple action menus for a touch-enhanced Phone or Tablet form.
Show navigation	Select the site navigation or select a menu for a touch-enhanced Phone or Tablet form.
Update control	Apply the current values of properties to the control and cause the control to reload and refresh the results list.
Update row	Update a row in a table.
Web capture	Save the pages that are scanned or uploaded using a Web Capture control.
Web service	Call a web service to perform a certain action.

Sort the actions list

You can sort the actions list on Name or Type.

Filter on action type

You can filter on action type. The **Type filter** list only contains the types that exist for the current form. For standard forms, the default is All, and for capture forms, the default is Non-capture.

Form events

This section describes the events supported by form and controls.

See [Action types](#) for more information about the supported actions.

See also:

- [Events and actions supported by form and basic controls](#)
- [Events and actions supported by advanced controls](#)
- [Events and actions supported by the capture forms and composite controls](#)
- [Events and actions supported by the tablet and phone forms](#)
- [Events and actions supported by an MFP form](#)
- [Events and actions supported by the Capture Client controls](#)

Events and actions supported by advanced controls

Form/ Form Controls	Events Supported	Actions Supported
Case health	None	None
Embedded page	None	None
Entity instance	None	None
File upload	Upload complete	All
Language selector	None	None
Process viewer	None	None
Work queue	None	None
Job list	Row selected	All
Checklist	None	None
Summary	None	None
Resource tree	On change	All
Web capture	<ul style="list-style-type: none"> • Document save complete • Ingestion started • Ingestion completed • Document changed • Page index changed • Control undocked • Control docked 	All
Thumbnail viewer	None	Display rule

Form/ Form Controls	Events Supported	Actions Supported
Document set	Document selected	All
Job action button	None	None
Activity action button	None	None
Create new associated job	None	None
KCM	Completed	All
Mobile capture barcode	Barcode captured	All

Note When a form fails to load, an error lists the reason for failure, such as the name of the event that failed to trigger upon form load.

Events and actions supported by form and basic controls

Form/ Form controls	Event supported	Actions supported
Form	<ol style="list-style-type: none"> 1. Loaded 2. Before render 3. After render <p>Note When using these events in a form, make sure that they are fired in the following order: Loaded, Before render, After render.</p> <p>Capture activity forms operate differently from other forms types in how they render. This is due to the ThinClient control, which requires that the onLoad actions complete before the control can fully render itself. So even though the Before render or After render events may have triggered on the containing form, the form itself may not actually have been rendered to the required state.</p> <p>For best practices on form loading events, see "Form loading events" in <i>Kofax TotalAgility Best Practices Guide</i>.</p>	All
Column	None	None
Row	None	None
Cell	None	None
Label	None	None
Text box	Text changed	All
Button	Clicked	All
Table	Row selected, Row deselected	All
Drop-down list	Selection changed	All
Check box	Check changed	All
Radio button list	Radio button selection changed	All

Form/ Form controls	Event supported	Actions supported
Calendar	Date changed	All
Tab	Tab loaded	All
Hyperlink	None	None
Image	None	None
Horizontal rule	None	None
Chart	None	Display rule

Note When a form fails to load, an error lists the reason for failure, such as the name of the event that failed to trigger upon form load.

Events and actions supported by the capture forms and composite controls

When you generate the capture forms (Document, Folder, Scan create new job, Scan - new activity, Validation, Verification, Document review, or Device create new job), a set of predefined events and actions is associated with the form by default. For example, a validation form has Validation form loaded event with take pending activity and validation control load batch actions. The validation control has the predefined events such as Add page, Delete pages and Move page. You can add other actions such as Redirect or .Net method to a capture form or a composite control.

Note

- If you regenerate a form, the state of the form changes. For example, if you remove any fields, they are re-added on regeneration and it requires manual effort to return form to the state it should be.
- On upgrading TotalAgility, all capture forms are updated to include the new actions and the form remains in the same state as it was prior to upgrade.
- When you import a capture form that does not have the actions, such as a form created in a previous version, the capture form is updated to include the new actions and the form remains in the same state as it was prior to import.

Events and actions supported by the Capture Client controls

The capture controls used in the capture activities expose events that correspond to the toolbar buttons, context menus, and hotkeys. Example: The OnDeletePages event is fired to delete the selected pages. Most of the events are pre-populated with actions to perform the intended operation and are available in multiple capture controls. Access to these events is based on the assigned capture permissions. You can customize these events in the TotalAgility Designer.

The following table describes the events available for capture controls, when they are fired and the action they perform.

Event	Capture control	Fired	Action
Delete pages	All controls except the Verification control.	On selecting one or more pages, and selecting the Delete page action using the toolbar, page context menu or a hotkey.	Deletes the selected pages.

Event	Capture control	Fired	Action
Move page	All controls except the Verification control.	On moving one or more pages using a drag-and-drop operation or a hotkey.	Moves the selected pages.
Rotate page	All controls except the Verification control.	On selecting one or more pages and selecting a Rotate page action using the toolbar, page context menu or a hotkey.	Rotates the selected pages.
Change document type	All controls except the Verification control.	On changing the document type for a document and pressing the ENTER key.	None
Create document	All controls except the Document review, Scan and Validation controls.	Never	None
Select document	All	When the selected document changes.	None
Select folder	All	When the selected folder changes. (For example, when a folder is selected in the Navigator.)	None
Delete document	All controls except the Verification control.	On selecting a single document, and selecting the Delete action using the toolbar, document context menu, or a hotkey.	Deletes the selected document.
Delete documents	All controls except the Verification control.	On selecting multiple documents, and selecting the Delete action using the toolbar, document context menu, or a hotkey.	Deletes the selected documents.
Reject documents	All	On selecting multiple documents and selecting the Reject action using the toolbar, document context menu, or a hotkey.	Rejects the selected documents.
Unreject documents	All	On selecting multiple documents, and selecting the Unreject action using the toolbar, document context menu, or a hotkey.	Un-rejects the selected documents.
Merge document	All controls except the Verification control.	On selecting a single document and selecting the Merge to Previous document action using the document context menu, or a hotkey.	Merges the selected document to the previous documents.

Event	Capture control	Fired	Action
Merge documents	All controls except the Verification control.	On selecting multiple documents and selecting the Merge selected documents action using the document context menu, or a hotkey.	Merges the selected documents.
Scan form loaded	All	On Scan CNJ form load.	None
Scan activity form loaded	All	On Scan activity form load.	None
Scan complete	Scan control		
Validation form loaded	Validation control	On selecting the document for validation.	Validates the selected document.
Verification form loaded	Verification control	On selecting the document for verification.	Verifies the selected document.
Document review form loaded	Document review control	On selecting the document for review.	Reviews the selected document.
Split document	All controls except the Verification control.	On selecting a single page and selecting the Split document action using the page context menu or a hotkey.	Splits the document at the selected page.
Move document	All controls except the Verification control.	On selecting a single document and moving the document using the drag-and-drop operation or a hotkey.	Moves the selected document.
Create folder	All controls except the Verification control.	On selecting a folder and selecting the Create folder action from the folder context menu, or a hotkey.	Creates a new child folder.
Delete folder	All controls except the Verification control.	On selecting a folder and selecting the Create folder action from the folder context menu, or a hotkey.	Deletes the selected folder.
Merge folder	All controls except the Document review, Scan and Validation controls.	Never	Not supported.
Split folder	All controls except the Document review, Scan and Validation controls.	Never	Not supported.
Move folder	All controls except the Verification control.	On selecting a folder and moving the folder using the drag-and-drop operation.	Moves the selected folder to a new location.
Save field changes	All controls except the Verification control.	On modifying the fields of a document or folder, and navigating to a different document or folder.	Saves if any fields are changed.

Event	Capture control	Fired	Action
Capture cancel activity	All .	On selecting the Cancel activity action using the toolbar or a hotkey.	Saves any changes, and cancels the activity.
Capture complete activity	All .	On selecting the Complete activity action using the toolbar or a hotkey.	Saves any changes and completes the activity.
Capture open activity	All controls except the Document review, Scan, Verification and Validation controls.	Never	None
Capture complete and take next activity	All .	On selecting the Complete and Take next activity action using the toolbar, or a hotkey.	Saves any changes, completes the activity and takes the next activity from the work queue.
Capture save activity	All controls except the Document review, Scan, Verification and Validation controls.	Never	None
Swap front and back sides	All controls except the Verification control.	On selecting a duplex page and then selecting the Swap front and back sides operation using the page context menu, or a hotkey.	Swaps the front and back sides of the selected duplex pages.
Process tab form load	Scan	On selecting the process that contains initialization variables.	Gets the initialization variables.
Reject pages	All	On selecting one or more pages and selecting the Reject action using the toolbar, the page context menu, or a hotkey.	Rejects the selected pages.
Unreject pages	All	On selecting one or more pages and selecting the Unreject action using the toolbar, the page context menu, or a hotkey.	Un-rejects the selected pages.
Create new job	Scan control in a Scan Create new job form.	On selecting the Create new job action using the toolbar, or a hotkey.	Creates a new job.
Confirm document type	Document review control	On selecting a document and selecting the Confirm document type action using the toolbar, or a hotkey.	Confirms the document type for the selected document.

Event	Capture control	Fired	Action
Override document problem	Document review control	On selecting a document and selecting the Override problem action using the toolbar, or a hotkey.	Overrides the problem for the selected document and makes the document valid in document review.
Restore document problem	Document review control	On selecting a document and selecting the Restore Problem action using the toolbar, or a hotkey.	Restores the problem for the selected document.
Override folder problem	Document review control	On selecting a folder and selecting the Restore problem action using the toolbar, or a hotkey.	Overrides the problem for the selected folder and makes the folder valid in Document review.
Restore folder problem	Document review control	On selecting a folder and selecting the Restore problem action using the toolbar, or a hotkey.	Restores the folder problem.

Capture field events

Event	Fired	Action
Choice Field		
Selection changed	When you change a field and shift the focus from it.	None
Field confirmed	When you select a field and then select the Confirm Field action by pressing the ENTER key on keyboard.	Confirm the selected field.
Field forced valid	When you select a field and then select the Force Field Valid action by pressing the CTRL+ENTER key.	Force the selected field to be valid.
Combo box drop-down	When you focus the Choice field and expand the choice list.	None
Text Field		
Text changed	When you change a field and shift the focus from it.	None
Field confirmed	When you select a field and then select the Confirm Field action by pressing the ENTER key.	Confirm the selected field.
Field forced valid	When you select a field and then select the Force Field Valid action by pressing the CTRL+ENTER key.	Force the selected field to be valid.
Boolean		
Check changed	When you change a field and shift the focus from it.	None

Event	Fired	Action
On field confirmed	When you select a field and select the Confirm Field action by pressing the ENTER key.	Confirm the selected field
Field forced valid	When you select a field and then select the Force Field Valid action using the toolbar or the CTRL +ENTER key.	Force the selected field to be valid.
Table		
Table cell confirmed	When you select the table cell and select the Confirm Field action by pressing the ENTER key.	Confirm the selected table cell.
Table cell forced valid	When you select a field and select the Force Field Valid action using the toolbar or the CTRL+ENTER key.	Force the selected table cell to be valid.
Table forced valid	When you select a table and select the Force Field Valid action using the toolbar or the CTRL+ENTER key.	Force the selected table to be valid.
Table row added	When you select the Add Row action from a table toolbar.	Add a new last row to the table.
Table row inserted	When you select a Insert Row action from a table toolbar.	Insert a row in the table before the currently selected cell or row. If there is no selected cell or row, the new row is added to the end of the table.
Table row deleted	When you select a Table Row select the Delete Row action from a table toolbar.	Delete the selected table rows.
Interpolate table	When you select a Table Row and select the interpolate table action from a table toolbar.	Perform interpolation using the selected row as the template for finding additional rows.
Table cell combo box drop down	When you focus the Table cell in a choice column and then expand the choice list.	None
Table populated row inserted	When you add a row to a table in a form using the Add Row action.	Insert a row populated with data into the table.
Table populated rows inserted	When you add a row to a table in a form using the Add Row action.	Execute a .NET action to insert multiple rows into the table.
Row selected	When you select a table row or any cell in that row.	None
Row deselected	When you deselect a table row or any cell in that row.	None

Events and actions supported by an MFP form

The following tables state the events and actions supported for basic and advanced controls on MFP forms.

Events and actions supported for basic controls

Form/ Form controls	Events supported	Actions supported
MFP form	Loaded MFP start button pressed MFP pause button pressed MFP clear button pressed MFP tips button pressed MFP scan complete MFP scan failed	All
Label	None	None
TextBox	Text changed	All
Button	Tap	All
Table	Row selected Row deselected	All
Drop-down list	Selection changed	All
Check box	Check changed	All
Image	None	None
Hyperlink	None	None
Tab	Tab loaded	All
Horizontal rule	None	None
Calendar	Date changed	All
Radio button	Radio button selection changed	All
Cells	None	None
List	List select row Menu button1 click Menu button2 click Swipe button1 click Swipe button2 click	All

Events and actions supported for advanced controls

Form/ Form controls	Events supported	Actions supported
Embedded page	None	All
File upload	None	All
Mobile capture	On image captured On image processed On image uploaded	All
Mobile barcode capture	On barcode captured	All

Events and actions supported by the tablet and phone forms

The following tables state the events and actions supported for basic and advanced controls on a tablet and phone forms.

Events and actions supported for basic controls

Form/ Form controls	Events supported	Actions supported
Phone form and Tablet form	Loaded Before render After render	All
Label	None	None
TextBox	Text changed	All
Button	Tap	All
Table	Row selected Row deselected	All
Drop-down list	Selection changed	All
Check box	Check changed	All
Image	None	None
Hyperlink	None	None
Tab	Tab loaded	All
Horizontal rule	None	None
Calendar	Date changed	All
Radio button	Radio button selection changed	All
Cells	None	None
List	List select row Menu button1 click Menu button2 click Swipe button1 click Swipe button2 click Item touch start Item touch move Item touch end	All

Events and actions supported for advanced controls

Form/ Form controls	Events supported	Actions supported
Embedded page	None	All
File upload	Upload complete	All

Form/ Form controls	Events supported	Actions supported
Mobile capture	Image captured Image processed Image uploaded	All
Mobile bar code capture	Barcode captured	All

Form variables

Form variables hold data at the form level for use wherever required within the form, such as within actions. This eliminates the need to create hidden fields on the form to hold data. Once created, use form variables in the same way that you use fields and global variables.

Example: Use form variables

To calculate the end date of a term based on the start date and the term duration, create a form variable that holds the value of the duration (in this case, one month). Configure an event on the button to add the start date and the duration and display the result.

The screenshot shows a form titled "Term Duration" with the following fields and controls:

- Name:** A text input field containing "John Terry".
- Start Date:** A date picker field showing "18/08/2013".
- Buttons:** Two buttons labeled "Calculate" and "Reset".
- End Date:** A date picker field showing "18/09/2013".

See [Manage form variables](#).

Deploy forms

Once you finish designing your form, save or release it.

- Saving a form saves the changes to the form with a minor version.
- Releasing a form makes the form ready for production and viewable at runtime, updating it to a major version.

Once a form is released, use the following URL to access the form at runtime:

```
http://[servername]/TotalAgility/Forms/<formname>.form
```

If a site is used, use the following URL:

```
http://[servername]/TotalAgility/Forms/<sitename>/<formname>.form
```

Form debugging

Debugging allows testing and debugging of forms at runtime. Debugging increases efficiency as issues can be identified much quicker when developing a solution.

In a debug mode, you can do the following with a form:

- Set breakpoints
- View and edit variable values
- Step through the actions, or run to the next breakpoint
- Expand Server side actions to show its inputs and output

Note The Client side actions cannot be expanded to show any detail.

Associate a form with an activity

A form can be associated with an activity through the Associated file path property on an activity.

This property is populated automatically when a Take activity form is generated, or can be populated manually.

When users take an activity, they are redirected to the form specified in the Associated file path property. If the property is blank, the users are redirected to the generic Take activity form.

Sites

Use site to define the default styling and navigation to get the look and feel of your solutions to your requirements.

You can use the same forms in different contexts to get different look and feel. You can create, modify and delete a site, and specify the supported language to use for your site.

Within the same site, you can configure settings to use for your Desktop, Tablet, and Phone forms. This means that you could have different styling for the same form depending on the settings, and the device on which you are viewing the form. For example, if the form is being viewed on a desktop, the form will be displayed based on the desktop settings (unless a specific header form or navigation has been selected in the form).

The same form can be used in multiple sites, but the look and feel changes based on the theme, header and menus associated with the site.

See [Create a site](#).

Themes

A theme is a set of design elements and color schemes that define the visual layout of forms. Themes provide a consistent, professional look and feel to your forms.

Once a theme is associated with a site, it is automatically applied to all existing forms within the site and to any new forms added to the site.

When you select a predefined style for your theme, the new look is applied to all forms using that theme.

You can also configure themes for form controls. Any settings for the controls at the form level override the site-level settings in the following order: control-specific styles, font/background overrides, and style sheet used in a theme.

See also:

- [Create a theme](#)
- [Maintain a theme](#)

Global variables

You can define variables as global variables for use across several forms.

For example, if you need to interact with the TotalAgility database, you can create a global variable with DSN=TotalAgility, as its value. The same variable can be used in different forms to interact with the TotalAgility database and its value can be managed in one place.

You can optionally provide localization for global variables.

TotalAgility provides the following out-of-the-box global variables with the Workspace package and they are used across Workspace forms:

- Case reference
- Job identifier
- Process identifier
- Process version
- Resource ID of currently logged-on user
- Name of currently logged-on user
- Session ID of currently logged-on user

See [Create a global variable](#).

Security tokens

Security tokens associated with security role and resources enable form designers to control the security of information by restricting access to relevant areas of an application and hide information that users are not authorized to see.

Site designers face the challenge of ensuring that information remains secure against threats from both inside and outside an organization. Security breaches can result in the loss of business opportunities, expensive lawsuits, and even bankruptcy. Therefore, it is imperative that you safeguard the integrity of your data against any violations.

For example, access to a section containing salary details could be restricted to the Finance team. This protects confidential information from unauthorized access.

Within the Workspace, administrators can create security roles and associate tokens and users with the security roles, thus delivering flexibility in how security is managed.

For more information on security, see "Form security" in *Kofax TotalAgility Best Practices Guide*.

See also:

- [Manage a security token](#)
- [Associate a security token with a control](#)

Navigation

Use navigation to define how users navigate a site, to go from one form to another.

You can add multilevel navigation capabilities to your site. The navigation menu acts as a roadmap with clearly marked destinations and suggested routes that direct users from one form to another.

You can add customizable vertical and horizontal navigation bars to your site and allow or deny access to menu items.

Note A vertical navigation bar can only be positioned at the left side of forms.

The navigation menu is defined at the global level; once applied to a site, it is available for all forms within that site. See [Create a site](#).

When you change a navigation item, such as a top level menu option or menu title, the changes are automatically applied across all forms using the defined navigation layout.

You can specify whether to include horizontal and vertical navigation menus on individual forms, as some forms, such as logon forms and pop-up windows do not require them. See the [General](#) properties of form.

The style for a menu depends on the menu style configured in theme. See [Create a theme](#)

For best practices on using menus, refer to the "Solution building > Building forms > Design guidelines" section in the TotalAgility Best Practices Guide.

Customer assets

You can upload "assets" such as images, style sheets, document templates, custom pages and .NET assemblies without having to keep files on the disk and access them using a public URL.

The assets are stored within TotalAgility and as such can be used during form and process design.

Form variants

Create multiple variants of a form to dynamically hide or disable controls and columns, or change the label text to display at runtime for all form types.

You can create one generic form and present it differently depending on the variant in use.

Note The following forms do not support form variants: Scan create new job, Validation, Verification, Document review, Scan, Document, Folder, Device create new job, MFP, MFP activity, MFP work queue and MFP Scan create new job.

See also:

- [Create a form variant](#)
- [Maintain a form variant](#)
- [Apply a form variant action](#)

Chapter 5

Workspace

Kofax TotalAgility Workspace is a web application that allows users to interact with activity lists, cases and processes; manage work and resources; and administer other data elements.

You can customize or extend the TotalAgility Workspace according to your business requirements.

Create work

Create jobs, cases and fragments

Within the Workspace a generic form is available to allow creation of a job, case or fragment. This form also displays any initialization parameters defined on the selected process.

For a case or case fragment, the case reference must be supplied.

As an alternative, a form specific to the process can be created in the Forms Designer (using the Build forms feature). This allows you to provide a tailored user interface for creating jobs for a particular process.

Job or case properties

When a job has been created it is possible to see the properties of this job. The properties form displays all artifacts related to the job in question. This includes the general properties, milestones, states, variables, notes, events, roles, and documents.

Find jobs or cases

You can search for jobs based on criteria, such as Priority, Due Date and Creator using the Show Query option in Workspace.

Manage work

Work queues

You can view the list of tasks assigned to you and all tasks assigned to the group (team) to which you belong. This helps you focus on the tasks or projects that require your attention, especially if you work in multiple areas at one time.

Queries panel

See [Queries](#).

Take and complete activities

Activities can be taken and completed by a resource to which the activity has been assigned directly to them or to a group that they are a member of. By taking an activity, the output parameter values can be updated and applied when the activity is completed. The workflow proceeds to the next activity in the process.

Delegate work

To handle sick time or vacations, use the Delegation feature to allocate new activities from one resource to another, for a specified time period.

Delegating an activity differs from reassigning an activity. When delegating, the activities appear on the work queue for both resources.

Reassign work

To change the assignment of an activity from one resource to another, you can reassign the activity. This results in the activity no longer appearing on the original resource's work queue.

Manual work allocation

You can manually allocate work in two ways:

- **Activity Centric:** Based on the importance of an activity, select the best resource to work on it.
- **Resource Centric:** Based on the importance of a resource and to optimize resource utilization, select the best activity to allocate to a resource.

Reset taken activities

This screen allows an administrator to reset activities taken by other resources to pending.

When an activity is taken by a resource but not completed, then the activity remains taken until one of the following actions occurs:

- The user cancels, saves or completes the activity.
- The activity is reset to pending.
- The user logs out of all active sessions.
- The user logs in (and there are no other active sessions).
- Session timeout occurs.

Modify live jobs and activities

In Workspace, you can view and change the properties of jobs that are Live, Suspended, or On Hold, which gives you the flexibility to respond to process changes as they happen.

You can also modify job activities that are in a pending state, members of floating roles assigned to a job, and the static resources, roles and groups assigned to each live activity in a job.

To modify jobs, you must have the correct access privileges.

Note You can only modify the activity members when workflow rules are not used for an activity at design time.

Place jobs on hold

Placing a job on hold delays processing for a specified period of time (up to 52 weeks). When a job is placed on hold, it means no activities are available on any work queues and no event processing is done for the specified hold time. When the hold time is completed, the job automatically moves to the active status and the activities become pending. Alternatively, you can Activate the job and therefore remove it from the hold status.

For example, you may want to place a job on hold if someone is off sick or on leave for a couple of weeks and you would rather place that job on hold than re-assign or delegate it.

Business calendar

The global business calendar enables you to set working or non-working days and working hours across all resources. Each resource can also have a personal calendar derived from the global calendar.

When the business calendar is turned on, these working or non-working days are taken into account when calculating due dates, SLAs and more within the system.

Manage your system

Logged on users

You can view a list of users currently logged on to the TotalAgility Workspace and log off selected users.

Audit log

Audit Logs are useful for tracking information pertaining to and resulting from the execution of a business process or system function. This information helps you pinpoint and analyze the cause of a change, who made the change, and when the change was made. You can view all audit logs or filter them by date range and audit log type.

Upgrade jobs

You can upgrade live jobs that are not complete or terminated to the latest released version of the job process map. This feature lets an organization make changes to live jobs without terminating or restarting them. The changes go into effect immediately.

Upgrading a job adds new items, such as variables, floating roles, work type fields and milestones to the selected jobs. The upgrade does not overwrite or delete any existing job data.

Remove finished jobs

You can remove all finished jobs or those within the specified time range, allowing database space to be freed.

Performance statistics

You can view performance statistics for a process and its activities over a specified time period or number of jobs. These statistics can be used to determine how cost- or time-effective a process or an activity is and if you need to make adjustments to improve it. As a result of this analysis, you can change some key operational items within the process and its activities.

View the following performance statistics for a process:

- A text description of the range, which is either a timeframe or number.
- A count of jobs that are being evaluated based on the selected range. For example, if you select last month as the date range, the statistics display the number of jobs covered during last month. However, if you select a number of jobs, for example, the last 1000, but only 50 jobs are available, the statistics display 50 as the jobs analyzed.
- The percentage and number of jobs completed within the specified duration.
- The percentage and number of jobs completed within budget.
- The average duration of jobs.
- The average cost of jobs.

Note The monitor service must be running to correctly record and display cost overruns when you view process performance.

Chapter 6

Resources in TotalAgility

A resource is a person or a group of people who work in an organization. In TotalAgility, you can create individual workers and groups, and add external resources to your system. You can have subgroups within groups. When a task is assigned to a group, any resource from that group (or its subgroups) can perform the task. For example, a financial company has three worker groups: Financial Analysts, Business Analysts, and Cost Analysts. Each group has expert resources. If you add the Business Analysts group and Cost Analysts group to the Financial Analysts group, any task assigned to the Financial Analysts group is available to the Business Analysts and Cost Analysts groups.

You must define resources, which are integral to setting up and creating business processes, before creating process maps.

Individual resource

An individual resource in TotalAgility is a person who is responsible for creating or completing work or performing administrative or supervisory tasks. Each worker must have a unique identity that allows authentication within the system.

Group resources

A group is a collection of one or more individuals. A group can contain other groups. An individual resource can belong to many groups.

When an activity is assigned to a group, it can be taken by any individual in that group or subgroups within that group.

TotalAgility provides the following default groups:

- **Administrators:** The members of this group have full control to the system.
- **Designers:** The members of this group have access to TotalAgility Designer and Transformation Designer.
- **Device Users:** The members of this group have access to MFP devices.
- **Everyone:** A special group within TotalAgility. All individual resources created in TotalAgility through resource configuration are automatically added to this group.
- **Insight Admin:** The members of this group can perform administrative tasks on Insight from TotalAgility.
- **Insight Users:** The members of this group can use Insight from TotalAgility.
- **Process Intelligence**

Note The installation user is automatically added to Administrator, Designers, Device Users and Everyone groups.

External resources

In some instances, you may add an external resource who joins the organization for a limited period to complete specialized activities. For example, you need an external solicitor on a temporary basis to verify the receipt of documentation.

External resources have limited access: they can only view their work queue, and take and complete the relevant activities listed on their work queue.

External resources can be assigned work directly or by means of role membership. They do not belong to the Everyone group.

Email address

You can assign an email address to each resource. A system setting is available to force uniqueness of email addresses.

Password

You can assign a password to a worker or external resource. The password is stored as an encrypted value.

Personas

Use personas to divide your target audience into individual groups of people. Each persona is distinct, based on individual interests and needs.

When you associate a resource with a persona, the resource is directed to a target landing page that offers content specific to that persona.

Resource extensions

You can extend information held in TotalAgility for all workers or groups by defining metadata at the system level. When you configure a worker or group, you can manage the values for that supplementary information, such as, resource address, date of birth, job title and more.

Working group

A resource can belong to many groups, but you can assign a working group to a resource to keep the focus on all activities related to that group.

Supervisors

A resource with managerial rights can become the supervisor for other resources, or a group of resources.

You can create a hierarchy of supervisors by assigning a managerial level 1 through 10, with 1 being the highest.

Security levels

Use security levels to control which resources can work on which activities. Security levels range from 1 to 10, with 1 being the highest level of security. The default security level of a resource is 10.

You can assign a security level to an activity, and only resources with a security level equal to or greater than that level can perform the activity.

Skill levels

Use skill levels to assign work to resources where the work must be performed by someone with a specific skill level. Skill levels range from 1 to 10, with 1 being the highest skill level. The default skill level of a resource is 10.

You can assign a skill level to an activity, and only resources with a skill level equal to or greater than that level can perform the activity.

Variable and fixed costs

A fixed cost is a one-off cost regardless of the time spent, whereas a variable cost has a rate per time period calculated based on the time spent. For example, a service engineer has a call-out charge of \$50 (a fixed cost) and charges an additional \$10 per hour (variable cost). Three hours work would cost \$80.

Variable and fixed costs can be accumulated and recorded based on the time spent working by that resource.

Variable costs can use days, hours, minutes and/or seconds as the unit of measure.

Active period

An active period is the duration for which a resource is active. You can assign start or end dates to each worker or external resource in TotalAgility, which grant access to the system without having to remove the resource.

An active user is one with no start date or a start date equal to or less than current date; also, an active user has no end date or an end date greater than current date. Inactive users cannot logon to TotalAgility.

Defining the active period is particularly useful for external users, as they may only be active for the duration of a case or for short periods of time. The active period also indicates when a worker started and or left the company.

Working category

A resource has access to many categories. Setting the working category allows the user to focus on all activities related to that category. The working category appears when a resource performs an action, such as opening a map or creating a job on a process in the TotalAgility Workspace or Designer.

Active Directory Synchronization

See [System processes](#).

Chapter 7

System data

You can reuse System data, such as server variables, lookups, entities, work types, document templates, and checklist templates, across your processes and forms.

See also:

- [Server variables](#)
- [Regular expressions](#)
- [Lookups](#)
- [Document templates](#)
- [Currency codes](#)
- [Checklist templates](#)
- [Checklist items](#)
- [Work types](#)

Server variables

Server variables are used to hold values that are global in the system; they can be used by any business process, case or case fragment.

Server variables can only have one value at any given time. For example, if the location of company templates is kept in a server variable and the location changes, you can change the variable value and the change would be reflected across all processes that use the variable. It is also possible to secure the values of these variables. For example, you may not wish anyone to see a connection string because it contains secure information. If the location is defined at the process map level, as a process variable, the location would need to be changed on all processes individually.

See also:

- [Create a server variable](#)
- [View associations for a server variable](#)

Regular expressions

Regular expressions are used in text format validation form fields, document fields, and password formats.

TotalAgility provides a number of predefined regular expressions. However, you can define your own regular expressions to use in forms and validators.

Lookups

A lookup is a list of static data items defined at the server level that can be used across all forms or processes.

Use lookups to display content in different languages and reuse a lookup within entities across processes or forms.

By default, the system creates a lookup in the language of your system. You can create or translate a lookup in a different language.

Note The language selected for a lookup at design time must also be available at the site level; otherwise, the lookup is not displayed at runtime.

See also:

- [Manage Translations](#)
- [Manage a lookup](#)
- [Create a multilingual lookup](#)
- [Translate a lookup](#)

Document templates

A document template is used to create a document.

You can upload document templates to TotalAgility and use these templates in a Document creation activity to create a document.

Note TotalAgility only supports Microsoft Word templates, .dotx and .dotm.

See also:

- [Upload a document template](#)
- [Maintain a document template](#)

Currency codes

Currency codes help in formatting text boxes within forms.

You can associate a currency code with a text box to mask the symbol and format in which the data is entered at runtime. This ensures the mask for data entry corresponds to the browser locale. For example, the format to enter Euros in Germany is different from entering the value when in Ireland.

The following currency codes are available out-of-the-box:

- Euro €
- Pound Sterling £

- Dollar \$

See [Manage currency codes](#).

Checklist templates

Use a checklist template to group commonly used items for reuse. For example, group Name, Address, Telephone Number and Email ID into a PersonalDetails checklist template and use the template to create employee records, customer details, or patient records.

In this example, the Customer Details and Employee Details templates have the following common checklist items: Name, Address, Email and Phone.

- For the Employee Details template, if you create one column, such as Complete, one option appears for each checklist item in the template at runtime.

The screenshot shows a window titled "Employee Details". At the top, there is a checkbox labeled "Complete". Below this, there are four rows of checklist items: "Name", "Address", "Email", and "Phone". Each item has a checkbox to its left and a document icon with a green plus sign to its right. At the bottom of the window, there are three buttons: "Cancel", "Complete", and "Save".

- For the Customer Details template, if you create two columns, such as Yes and No, two options appear for each checklist item in the template at runtime.

Customer Details

Yes No

Name	<input type="checkbox"/>	<input type="checkbox"/>	
Address	<input type="checkbox"/>	<input type="checkbox"/>	
Email	<input type="checkbox"/>	<input type="checkbox"/>	
Phone	<input type="checkbox"/>	<input type="checkbox"/>	

See also:

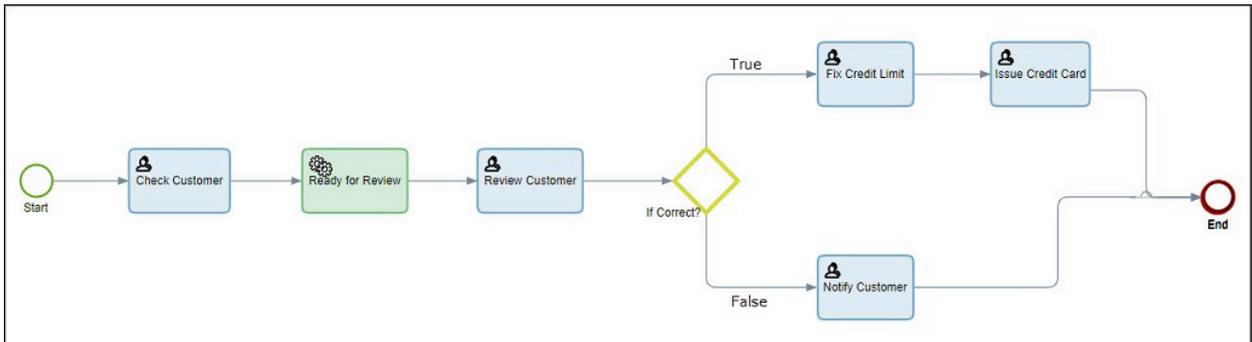
- [Create a checklist template](#)
- [Maintain a checklist template](#)

Checklist items

Checklists can guide inexperienced users through each step in a process.

Use the output from checklists to display the stage of the job. For example, a customer applies for a credit card online, and provides a name, address, employer name, and yearly income. The bank verifies the details and determines the credit limit. The bank can use a verification checklist to track the process as shown in the example map:

- **Check Customer Details:** In this activity, the checklist is an output variable and the Bank Clerk checks the details and completes the checklist. TotalAgility sets the state of the job as ready for review and the job passes to the Review Customer Details activity.
- **Review Customer Details:** In this activity, the checklist is set as input and output variable. At this stage, the checklist appears in two columns; the first column completed by the Bank Clerk is read-only. The second column is editable and is completed by the Bank Manager who reviews the details.
- **Fix Credit Limit:** After the Bank Manager completes the checklist, if the details are approved, the job passes to this activity.
- **Notify Customer:** If the details are not correct, the job passes to this activity and the credit card is not issued.
- **Issue Credit Card:** In this activity, the bank issues the credit card.



Create a checklist.

Creating a checklist involves:

1. [Creating checklist items](#)
2. [Creating checklist templates](#) that can group one or more checklist items

Use the Ready for review node to enable a checklist for review.

See [Configure a ready for review](#) activity for more information.

A checklist has three states that determine whether the checklist is editable, and whether the checklist includes a second column of data:

- **Read only:** The checklist is only set as an input to an activity.
- **Read/write:** The editable checklist is an output of an activity.
- **Review:** A Ready for review node marks the checklist for review. The first column in the checklist is read-only. The second column is editable.

At runtime, you can enter comments against any of the responses defined for the checklist, and can select one response to apply against all questions at once.

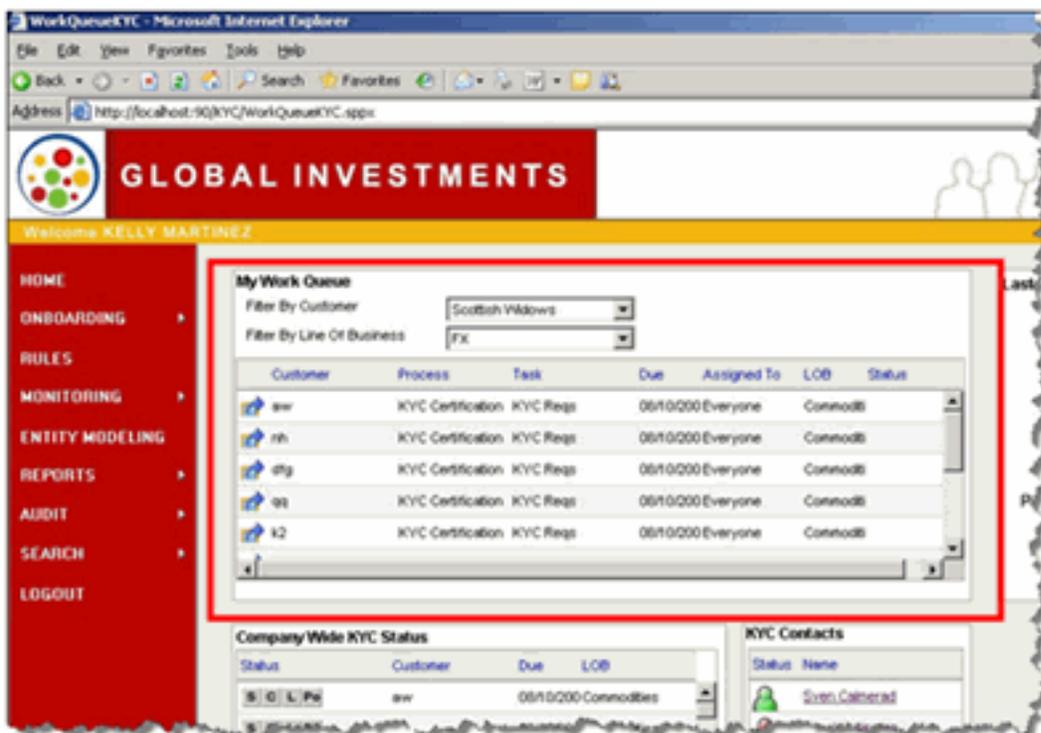
Before you progress an activity, you can query a checklist to determine if all items are complete.

See [Manage a checklist item](#).

Work types

Work types help in controlling the appearance and behavior of fields on a work queue form.

The following image displays the work queue of a user, where the tasks can be taken and completed.



By default, process maps use a standard work type, which appears on a work queue window and consists of the following standard fields for a job or task:

- **Take activity button**
- **Name**
- **Description**
- **Due date**
- **Priority**
- **Job ID**
- **Version**
- **Process**
- **Resource**
- **Job SLA status**
- **Job state**
- **Activity SLA status**

You can create work types under any category for which you have full control or read write access. You can create a copy of a work type, associate the work type with a process map, and view all the process maps associated with a work type.

Work types are synchronized to the process maps with which they are associated. When you modify a work type, the changes apply to all maps that use it.

You can customize a work queue by creating work types with custom fields. Customizing a work type reduces overall development time, because the programmer can render the work type on a web page or form.

Each custom work type can contain up to 30 additional fields (variable names), which can display variable values obtained from within or from an external system, such as SUPPLIER_NAME, DOC_ID, DOCUMENT_NAME and INVOICE_NO.

Note At runtime, only 100 characters are stored as the value of the field.

The GetWorkQueue2 API returns the custom fields in the work type, and lets you sort, prioritize, and filter work queue tasks.

For more information on the GetWorkQueue2 API, see [Access the SDK documentation](#).

See also:

- [Create a work type](#)
- [Associate a work type with a map](#)
- [Maintain a work type](#)

Chapter 8

Capture

Using TotalAgility, you can drastically reduce your organization's labor-intensive processes by capturing all types of content for automatic classification, extraction, validation and delivery into applications, processes and repositories.

Capture information at any point in business process and without human intervention, extract, separate, classify, validate and perfect information. For example, after the loan application process starts, a financial institution may request documents, such as Proof of Income and Credit Reports. The information can be captured anytime from any source, including from mobile or tablet devices, and ingested into the loan approval process.

Classify documents; define scanner or device settings for reuse; and separate and automatically place documents in folders during capture.

You can export images (or both images and text that has been automatically extracted from the images) to a PDF or other file format, define resolution and quality and more. You can identify text and graphics, convert to HTML and XML file formats, and ensure interpretation by assistive software for the visually impaired.

You can also create capture related items, such as extraction groups, document variants, field formatters and field validators.

See also:

- [Extraction groups](#)
- [Classification groups](#)
- [Folders](#)
- [Document / Activity variants](#)
- [Field formatters](#)
- [Field validators](#)
- [Field zoom settings](#)
- [Document conversion profiles](#)
- [PDF profiles](#)
- [Scan/VRS profiles](#)
- [Separation profiles](#)
- [Control layouts](#)

Extraction groups

An extraction group is a set of one or more document types that helps to classify and process the documents.

An extraction group contains a default document type called `RootDocumentType`. All document types are created within the default document type.

See also:

- [Create an extraction group](#)
- [Properties of an extraction group](#)
- [Work with extraction groups](#)
- [Document type](#)
- [Field groups](#)
- [Fields](#)

Classification groups

A classification group is a set of extraction groups. A classification group helps in classifying documents.

You can include the same extraction group in multiple classification groups.

See also:

- [Create a classification group](#)
- [Properties of a classification group](#)
- [Work with classification group](#)

Folders

A folder is a group of one or more folder types that help classify and process documents. For example, a Human Resources folder may include folder types for Recruitment, Skill Set, Salary Revision, and so on.

By default, TotalAgility contains a root folder that includes the following system-defined fields: Instance ID, Type and No. of documents. You can create a hierarchy of folders within the root folder. Each folder can include a child folder. All custom folders automatically inherit fields from the default folder.

Once a folder type is created, you can maintain the folder type.

See also:

- [Add a folder type](#)
- [Add a field group](#)
- [Add fields to a field group](#)

Document / Activity variants

Create variants against a document type and specify the fields to ignore. Thus, you can have one generic document and present it differently depending on the variant in use.

You may have one generic document type, such as Invoice; however, some of the fields may not apply to all types of invoices. For example, Company A does not include a discount field in their invoice whereas Company B always includes the discount with a specific value.

When this document type is used within a scan, validation, verification or a document review form, the fields configured to be ignored do not display and are considered valid for the lifetime of this document.

To support multi-stage validation, you can create an activity variant for a document variant to show and hide fields. This enables multiple resources to validate a document in stages with the visible fields considered valid for the activity but possibly invalid for the document.

The document variant option is only available when you generate a Scan create new job or Scan - Activity form. Variants are not available on the file upload or any other capture controls, documents captured this way can be updated to apply a variant using the SDK.

When you apply a validation rule, all hidden fields are considered valid, and if you configure multi-field validation rule and some of the required fields are hidden, the multi-field rule is not executed.

When you take an activity or create a new job using Scan, the variant is applied to the document at the point of creation, the variant version is then set to the latest active version. If the variant does not exist at that point, the document is stamped with the variant but the version is set to 0. The only way to update this and apply the variant is to re-classify the document.

You can copy a variant within a document type or from a parent document type to a child without the need to recreate the entire variant manually to make small adjustments.

See also:

- [Create a document variant](#)
- [Create an activity variant](#)

Field formatters

Field formatters are used to force the contents of extracted fields into a predefined format for consistency.

For example, an amount may contain decimals and commas, such as 1,500.00. Use the Amount formatter to reformat amounts to numeric values (1500).

TotalAgility supports the following formatter types:

- Amount: Configures settings related to monetary amounts and currency.
- Date: Configures date formats.
- Percentage: Configures percentage formats.
- Business rule: Performs special formatting based on a business rule. A business rule can also be used to do dependent formatting whereby the format of a field depends on the value of another field.

The Amount, Date and Percentage are used as single-field formatters; whereas, the Business rule can be used as a single-field as well as a multiple-field formatter.

TotalAgility provides two default formatters:

- `DefaultDateFormatter`: Contains basic date formatting, such as the date order and date output format.
- `DefaultAmountFormatter`: Contains the default currency and typical decimal symbol formatting.

You can associate a formatter with document or folder type fields, including table columns.

For best practices on formatters, see "Formatting" in *Kofax TotalAgilityBest Practices Guide*.

See also:

- [Manage a field formatter](#)
- [Date formatter](#)
- [Amount formatter](#)
- [Percentage formatter](#)
- [Business rule formatter](#)

Field validators

Define the field validators globally and reuse them on specific fields so that you do not have to define the validators multiple times.

You can use the global field validators at the field level of document types and folder types.

See [Add a field validator](#).

Field zoom settings

The field zoom settings let you configure the zoom area for each document field.

If there are any associated zones, you can set the auto-zoom relative to field zone size or set a different zoom level.

If there are no associated zones, you can set which page in the document to navigate to, such as 1st page, last page, 3rd page and what area in a page to zoom to, such as top 20%, bottom 30%, top-right 10%, or bottom-left 15%.

Document conversion profiles

A Document conversion profile contains conversion settings for converting the incoming documents.

Create a document conversion profile by configuring the required conversion settings for specific type of incoming documents. The document conversion activity uses the document conversion profile for document conversion. You can create one document conversion profile and reuse the same in various

process maps. Also, multiple document conversion profiles can be created to cater different incoming documents types.

Additionally, the Adobe PDF Library SDK smoothing and rendering flags are used for improving the JPEG quality of PDF to TIFF conversion. These flags eliminate the black lines introduced in certain PDF types during document conversion.

Note

- If you select Microsoft Office for document conversion in Message Connector, only one instance of conversion process can run on one system at a time.
- For some PDF documents, when the expected output TIFF format is 200x200 DPI color or 200x200 DPI Grayscale, no combination of the flags can eliminate black lines.
- For TIFF to PDF document conversion, use the [PDF generation activity](#).
- You cannot add a Document Conversion activity in a Composite activity.
- Conversion of password protected PDF Portfolio and ZIP files is not supported.

See also:

- [Document conversion activity](#)
- [Add document conversion profiles](#)

PDF profiles

Use a PDF generation profile to improve the PDF output of a document.

You can export images and text to a PDF (Portable Document Format) file, make the output PDF files PDF/A compliant, define resolution and JPEG quality, and more. You can add PDF tags to identify text and graphics, convert to HTML and XML file formats, and ensure interpretation by assistive software for the visually impaired.

Scan/VRS profiles

Use Scan/VRS profiles to store common scanner, normalization, binarization, conversion and image perfection settings for reuse.

You can also configure advanced eVRS settings to further enhance the image quality, which includes cropping, de-skewing, de-speckling, advanced binarization and more.

Note Kofax eVRS is an image enhancement tool that is used to enhance the quality of images.

TotalAgility provides a default Scan/VRS profile. You can edit the default profile or create additional profiles. You can associate a Scan/VRS profile with a capture-enabled process or use it in scan interfaces, on phone devices, in upload scenarios and more.

Interaction of Scan/VRS profiles and Web Capture service with VRS Elite

When scanning from a VRS Elite Twain-On-Top source, image processing is disabled in TotalAgility, as VRS Elite handles it. Therefore, image processing must be configured through VRS Elite. VRS Elite then performs image processing before passing the image to TotalAgility.

If a Scan/VRS profile is configured, the same name is used to auto-select a VRS Elite profile.

See [Scan forms](#) under System > System Settings > User behavior.

Note A scanner workstation CPU can influence VRS scanner performance. A slower CPU slows down scan performance, and a faster CPU speeds up scan performance and brings it closer to the scanner's rated scan speed. Therefore use a high-end workstation to scan through VRS to scan large documents.

Using Scan/VRS profile for MFP scanning

A Scan/VRS profile can serve two purposes in MFP scanning.

1. Push “Scan settings” to MFP, so that the MFP scan engine uses the specified scan settings.

This includes settings such as:

- Color mode (Such as, scan in color, grayscale, or black and white)
- Resolution
- Page size
- Page orientation
- Simplex/Duplex
- Page source (ADF or Flatbed)

When an MFP performs scanning, it configures its scan engine to use the corresponding settings.

2. Indicate “Image processing settings”, so that when an image is received by TotalAgility from the MFP, it will use eVRS to perform the indicated image processing.

This includes settings such as:

- Output color
- Output resolution
- Auto rotate
- Auto crop
- Blank page deletion
- Deskew
- Despeckle
- eVRS command strings

See also:

- [Create a Scan/VRS profile](#)
- [Properties of a Scan/VRS profile](#)
- [eVRS command string modules](#)
- [eVRS strings examples](#)

- [Minimum image size](#)

Separation profiles

Use Separation profiles to separate and automatically place documents in folders during scanning.

Control layouts

Use the Control layouts option to create capture form layouts.

The capture control is used for capture activities like Scan, Scan create new job, Verification, Validation, and Document review. A layout can be shared and/or reused between forms of the same capture control type.

Note You cannot assign a Scan create new job layout to a non-Scan create new job form.

A layout consists of the following four panels:

1. Navigator
2. Thumbnails
3. Image viewer
4. Fields

You can customize a layout, and swap, dock, resize, collapse or even hide the layout panels.

Note If a Capture form has undocked document, we do not recommend viewing it using Internet Explorer due to a known memory leak in Internet Explorer.

See [Create a Capture control layout](#).

Chapter 9

Translation

The Translation functionality available within TotalAgility enables you to create a full multi-lingual solution for the user. You can provide or import translations for multiple languages for artifacts within the solution.

TotalAgility adheres to the Internationalization (i18n) and Localization (l10n) standards, which define the parameters for adapting computer software to different languages and regions.

Process details, such as activity names within a work queue are displayed extensively throughout solutions; therefore, process elements, such as activity name, SLA description, work types, page renditions and categories are available for translation. If the Enable multilingual processes setting (System > System settings > General) is not enabled, you can translate the process, but the process will only appear in the base language at runtime.

Forms provide the main user interface to your solution; therefore, each item, such as control text, radio buttons, text fields, check boxes, column headings, navigation text, entities, and table header that is visible to the end user is available for translation into one or more languages.

Note

- On Windows, the Microsoft Virtual keyboard is disabled when using a text box in password mode.
- If upgrading a form from the previous version, manually save and release the form to make the Work queue and Job list column headings available for translation.

In TotalAgility, you can define the languages that your process supports for translating items so that you can serve target markets without language and regional restrictions. You can select from the list of languages supported by TotalAgility.

Note You can select up to 215 languages for translation.

When you add a language and provide translation, at runtime all the data appears in the correct language set for the browser either through browser settings or through the Language selector control. If translations are not available for the browser language then the elements are displayed in the base language. The Language selector control selections are based on the languages supported by the site. If translations are not available for the browser language then the elements are displayed in the base language.

You can also export and import languages:

- Use APIs in the Job Manager component to get or set the language of a particular job.
 - Use UpdateJobLanguage to pass in the job identifier and language code to set the language for the job.
 - Use GetJobLanguage to pass in the job identifier to return the language for the job.

- Render any forms displayed in the language of the job by adding a Set Language from Job action. Add the action to a form and pass in the jobID. This sets the language of the form when it loads. The translation for the language must be available.

See also:

- [Translate elements into supported languages](#)
- [Add a language selector control to a form](#)
- [Export languages](#)
- [Import languages](#)

Chapter 10

Queries

Queries help you search for required jobs and activities, and view the workload for automatic and manual tasks.

You can create job, work queue and system queries and also share these queries with specific individuals or groups. The job queries help you search for required jobs, and work queue queries to search for required activities. The system queries help you view the workload for automatic and manual tasks so that you can take actions to avoid delay in processing tasks, and improve performance. You can view the completed work performed in the system, and identify and analyze the areas of concern.

Manage the display of the columns in the queries at runtime by selecting the columns and sorting them in the order of appearance, or define a custom sort order and specify the direction for each field as ascending or descending.

You can configure the query to display the count of items regardless of the retrieval limit specified in the query where count is the distinct number of activities in the system. For example, if an activity is assigned directly to you and to a group you are a member of, the activity is shown twice in your work queue even though it is one distinct activity.

When you view the query in a Job list, Work queue or Workload control at runtime, the total number of items matching the query are displayed. The count of items are displayed in brackets beside the title above the table.

See also:

- [Create a Job query](#)
- [Create a Work queue query](#)
- [Create a System query](#)

Chapter 11

System

This section includes the following:

- [Categories](#)
- [Job schedules](#)
- [System settings](#)

Categories

Use categories to group related items (from resources to processes) in TotalAgility and provide a means to restrict or provide access.

You can track different types of items that are related but stored in different folders. For example, associate all business processes along with any resources used in the Finance department with the Finance category.

TotalAgility provides the following out-of-the-box categories:

- **Default Category**
- **System Category**
- **TotalAgility Forms:** This category includes TotalAgility Workspace forms.
- **Business Rule Parameters:** This category is only available on upgrading TotalAgility, or when you import a logic rule in an older map. Any business rule parameters are imported as server variables and placed in this category.

We recommend that you create your own categories. You can also create categories within categories.

Note You cannot delete the Default and System categories; however, you can modify their descriptions.

See [Manage a category](#).

Job schedules

TotalAgility provides scheduling capabilities with inbuilt Job Scheduler. You can create your own job schedules that can be used to schedule work. A job schedule consists of a process, its initialization data and frequency of creation.

You can schedule one or more jobs to be created at a specific time period or intervals. For example, regular updates to database, synchronizing with third party systems, and more.

TotalAgility provides the following job schedules:

- **SYSTEM (do not delete) - AUTO WORK ALLOC:** Performs work allocation automatically.
- **SYSTEM (do not delete) - DELEGATION:** Checks for completed delegation.
- **SYSTEM (do not delete) - Reset Sampling:** Resets quantity counts.

See [Manage a job schedule](#).

System settings

This section describes the various system settings available for use within your system.

These settings are grouped under the following cards:

- [Database, retention and reporting](#)
- [Utilities](#)
- [Process](#)
- [Logon and authentication](#)
- [System](#)
- [User behavior](#)
- [License servers and statistics](#)
- [Capture](#)
- [Access control list](#)

Database, retention and reporting

This section includes the following system settings:

- [Database settings](#)
- [Retention policy](#)
- [Reporting server](#)
- [Reporting tags](#)

To open this card, navigate to **System > System settings > Database, retention and reporting** and then select the system setting to configure.

Database settings

You can view and configure the database settings if you have sufficient access permissions.

Note [Restart](#) the TotalAgility IIS Application Pool, TotalAgility Core Worker Service and TotalAgility Streaming Service for the updated settings to take effect.

Database version

The system displays the database version (read-only).

Write to audit log

Maintains an audit log in the database.

Note While audit logging can be useful for monitoring server activity and performance, the audit data can increase the TotalAgility database significantly. You can clear this setting to reduce the database size, and increase performance. However, if you do wish to maintain the audit log, configure the associated retention policy to delete the old audit log entries.

Archive mode

When a job completes (either through natural completion or through termination) it can be archived, automatically or manually, with job details from the live tables to the finished tables to improve performance.

- **Automatic:** A periodic system task archives the job details from the live to finished tables.
- **Manual:** Archives the finished jobs when you click the "Archive finished jobs" link under Utilities, otherwise the jobs remain in the live jobs table. See [Archive finished jobs](#).

Note When upgrading TotalAgility, the "Archive finished jobs" property retains the same setting that was set prior to upgrade.

Retention policy

Older and unused items must be removed from the system to prevent unnecessary database growth.

Retention policies can automatically assist in minimizing the database size. By default, the system does not provide any retention policies, and therefore all artefacts are retained indefinitely in the database unless they are manually removed.

Defining the retention period and the number of versions to retain for certain items helps in cleaning up unused items, managing database growth, and optimizing performance.

See [Configure the retention policy](#).

Also see "Retention policies" in *Kofax TotalAgility Best Practices Guide*.

Version based retention

By default, all versions are retained. You can optionally retain a number of major versions of forms, processes (including skins), business rules, classification groups and extraction groups. For example, retain last 15 versions of a process.

For Custom retention, default is last 10 versions and minimum is 1 version.

Note

- A process version cannot be deleted if there is any job based on it (live or finished).
- When a classification group or extraction group is removed, the project needs to be removed from Transformation Designer.
- The extraction group can be removed even if there are documents that reference it. Therefore, there is no need to check existing documents.

Time based retention

By default, items are retained indefinitely. You can configure the custom retention period.

The retention period is the number of days, months or years for which an item can be retained. Once the retention period is over, the item is automatically removed from the database.

You can define the retention period for the following:

- Internal users: Where the end date is greater than the retention period.
- External users: Where the end date is greater than the retention period.
- Audit log entries: Where the date logged is greater than the retention period.
- Documents: Where the LastAccessedAt date is greater than the retention period. After document deletion, if there are no documents left within folder hierarchy, the retention policy also deletes the root folder. The retention policy does not delete Online Learning folders or their subfolders.
- Folders: Where the LastAccessedAt date of the root folders is greater than the retention period (the value from document retention is used) and if the folder hierarchy does not contain any documents, and the folder hierarchy does not contain locked folders. The retention policy does not delete Online Learning folders or their subfolders.

Note The retention policy does not delete the subfolders separately; they are deleted as part of root folder that matches the retention policy.

- KCM packs: Where the created date is greater than the retention period.

You can configure the retention period for a specific process to get jobs purged by the Retention Policy system task. The retention period defined at the process level takes precedence over the system settings.

See [Configure the retention period for a process](#).

Retention process execution

The Retention Policy system task handles deleting items from the database.

By default, the Retention Policy system task deletes all the jobs and documents that are ready for deletion. The Maximum jobs and Maximum documents settings indicate how many are deleted at a time while repeating the process until all jobs and documents that are ready for deletion have been deleted.

For example, if there are 1500 jobs and 2000 documents ready for deletion, when the Retention Policy task executes the first time, 1000 jobs and documents are deleted. When you repeat the deletion process, another 500 jobs and 1000 documents are deleted. When the Retention Policy task executes the next time, it will delete all the jobs and documents that are ready for deletion (in chunks of 1000).

You can define the maximum number of documents and jobs that can be deleted per retention task execution.

Retention policy system task

The Retention Policy system task handles deleting items from the database. By default, this system task runs once a week (minimum: 1 hour). If you want to review the items marked for deletion, the system task can be scheduled to run less frequently. On the contrary, if you want to delete the items without viewing them, the system task can be scheduled to run more frequently.

Note By default, the Retention Policy system task deletes the first 1000 jobs and documents that are ready for deletion. For example, if there are 1500 jobs and 2000 documents ready for deletion, when the Retention Policy task executes the first time, only 1000 jobs and documents are deleted. When the Retention Policy task executes the second time, the remaining 500 jobs and 1000 documents are deleted.

For example, if the retention policy system task runs weekly (on a Sunday) and a job is to be retained for 1 week:

- Job is completed on Monday (1st)
- The earliest the job can be deleted is Monday (8th)
- Retention Policy task runs on Sunday (7th). As the job is not ready to be deleted, it will remain in the system.
- Retention Policy task next runs on the following Sunday (14th). The job will now be deleted.

Depending on the frequency of the retention policy task in relation to the retention policy of the item, something to be retained for 1 week may actually take nearly 2 weeks to be deleted.

If you set the Retention Policy for a month, the system task deletes the items regardless of number of days in a month. For example:

- System task executes on March 29, YYYY 17:00. If this is not a leap year, all jobs (based on Process ABC) completed and terminated before February 28, YYYY 17:00 are deleted.
- System task executes on March 29, YYYY 17:00. If this is a leap year, all jobs (based on Process ABC) completed and terminated before February 29, YYYY 17:00 are deleted.

Reporting server

The Capture data is stored in a Reporting database. You can define how this data should be handled.

Reporting warehouse ETL agent

The time period within which the ETL agent handles the system task (extract/transform/load) and transforms data from staging to warehouse.

(Default: 0 Hrs 0 Minutes and 23 Hrs and 59 Minutes)

For on-premise multi-tenancy and Azure environments, the system tasks are created per tenant basis with ten minutes interval between the tasks for one tenant. Each task is handled separately and appropriate pair of staging/warehouse databases are processed with one pair per one system task.

Note You can narrow this transformation to nightly hours of the tenant to improve availability of Warehouse database for customers.

The "Reporting warehouse ETL agent" setting is configured once per TotalAgility installation for an on-premise environment, and per tenant for on-premise multi-tenancy and Azure environments.

Data retention period

The period for which the data associated with the fields and documents can be stored.

(Default for fields = 5 days, default for documents = 3650 days (Ten years))

Reporting tags

A reporting tag added to a process enables Kofax Analytics for TotalAgility to apply a custom filter on a report.

The name of a reporting tag cannot be more than 50 characters.

You can update or delete a reporting tag.

Utilities

This section includes the following system settings:

- [Archived finished jobs](#)
- [Job clear down](#)
- [Protected items search](#)
- [Lock status search](#)

To open this card, navigate to **System > System settings > Utilities** and then select the system setting to configure.

Archive finished job

When a job completes (either through natural completion or through termination) it is possible to archive all detail relating to this job from the live tables to the finished tables to improve performance.

The finished jobs can only be archived if the archive mode is manual. See "Archive mode" in [Database settings](#).

Note

- If for any reasons the archiving process fails, you can track this information in the "Archive job failed" entry type in the TotalAgility Workspace audit log, and see the details of the error in the event log.
- If the jobs are not archived, click the "Archive finished jobs" link once again.

Tip As a best practice, move finished jobs to separate tables and maintain them in a separate database to manage the database size.

The "Archive finished jobs" setting is selected by default. As a result, once a job is complete, the "Archive jobs" system task moves the job to the archive table. This ensures that your live jobs tables are kept to a minimum and do not continually grow.

We recommend that you move finished jobs to the archive tables or purge them when the jobs complete (or periodically).

If you do not require the history of some jobs, clear the "Record history" setting in the process (Process properties > History, reporting and execution tab).

Job clear down

The Job clear down utility is a permission-based capability available to remove live and finished jobs from the database. This utility is typically used in production or test environments to remove test jobs.

The Job clear down option is only available if you have the appropriate permissions and the system is running a development license.

Status

The type of jobs to clear:

- **All**: Clears all jobs.
- **Live**: Clears all live jobs.
- **Finished**: Clears all finished jobs.

Creation date

The creation date range: **All** jobs, all **Live** jobs or all **Finished** jobs.

- **All**: Clears all jobs irrespective of dates.
- **Since**: Clears jobs created after a specific date. Enter or select the date.
- **Between**: Clears jobs selected within a period. Enter or select the date range (**From date** and **To date**).

Search for protected items

You can search for the protected items and view the associations for these items to identify all instances an item is being used. You can also delete an item directly from TotalAgility. The protected items are not available to view within the Designer; therefore, it is not possible to know if these items are in use within a process, form or business rule. For example, you may be prevented to delete an item that is in use within a process.

Note The search is based on the highest versions of the item. For example, if version 1 of TestProcess is protected but version 2 of TestProcess is not protected, the search result does not return TestProcess.

Lock status search

You can track locked items based on the item name, item type and the resource that locked the item. Search for a combination of items, for example, search for all the forms or processes locked by a resource. The Lock and Unlock options enhance control and configurability for items in the TotalAgility Designer. By default, an item, such as business process is locked when created, to restrict other resources from modifying. Use the Unlock option to allow others to modify items. You can set the access permissions for a resource that can search for locked items. See [Access permissions](#).

Process

This section includes the following system settings:

- [Exceptions](#)
- [Process node colors](#)
- [Scripting](#)

- [SLA and work assignment](#)

To open this card, navigate to **System > System settings > Process** and then select the system setting to configure.

Exceptions

An exception is a way of escalating to the user when a particular situation arises within the running of a process.

For example, an exception is raised if the system is unable to connect to a remote server to download important data, or if no resource is available to pick up a particular job.

You can handle an exception by assigning a process map as an escalation process. For example, configure an Insurance Premium Policy process to automatically send an email if customers do not submit their insurance premiums by the due date.

TotalAgility provides predefined exception-handling codes. Each exception code is a placeholder for a particular type of exception (process map). You can use these processes in your map to address unexpected events, such as throughput, capacity and workload changes, without manual intervention or process termination.

You must create the process map to run whenever the exception code is called. For example, the exception code EXP0001 is called whenever a resource has been inactive for an excessive period of time.

Some of the most frequently used examples of exceptions:

- EXP0013—Activity Due: Triggers whenever an activity due date is passed.
- EXP0005—Job Duration Overrun: Triggers whenever a user takes longer than expected to complete a job.

The maps associated with predefined exception codes belong to the following categories.

- **Workload exception maps:** These maps can handle business exceptions, such as costing or timing that run outside normal business tolerance, such as job duration overrun or activity overdue.
- **System fail exception maps:** These maps run when some element of the system process fails. For example, if a connection cannot be made to a remote server to download information, or if a script object fails to execute.

You must assign variables as initialization parameters to track the source of an exception. See [Exception maps and initialization parameters](#).

You can configure exception handling at the server level. See [Configure exception handling at the server level](#).

A map assigned to an exception at the server level is, by default, assigned to that exception at the process level. You can override the default process map and select a different map for the exception. See [Configure exception handling for a process](#).

For more information on exception handling, see "Business calendar" in *Kofax TotalAgility Best Practices Guide*.

Process node colors

You can set the standard colors for various activity types within the process for ease in identifying the activity type.

Note On upgrading TotalAgility, the node color for all the activities is blue by default.

By default, the following colors are available for manual, automatic, integration and miscellaneous activities.

Activity	Activity type	Default color
Manual	General (Ordinary activities)	#7aadcc
	Capture (Scan, Validation, Verification, and Document review)	#7aadcc
Automatic	General (Create new job, Create subjob, Data access, Synchronization, Expression, Script, Document set, Embedded process, Loop, XML, Resource info, Job owner, Job variable, Sleep, Supporting info, Restful service, Document creation, Ready for review, and Business rule)	#78be83
	Capture (Extraction, Classification, PDF generation, Image processing, Composite, Delete, Export, Transfer, Document conversion, and Image quality analysis)	#78be83
	.NET	#78be83
	Web services	#78be83
Integration	Microsoft	#b897ce
	RPA	#b897ce
	SignDoc	#b897ce
	KCM	#b897ce
	Micro Focus Content Manager	#b897ce
Miscellaneous	Other (Embedded process)	#c19d42

Scripting

A script is a series of instructions that can be executed in a given language.

In TotalAgility, you can associate VBSCRIPT, C# and VBNET scripts with an activity. Once the activity becomes active, the associated script is executed. VBSCRIPT is not supported in an on-premise multi-tenant environment.

You can enter the data exchange script for CSHARP and VBNET script activities. This script can either be executed prior to executing the script entered for an activity or it can be executed as part of the script for the activity.

If you want to use SParms in the text of the script activity then you must use the Preload and run data exchange function; otherwise, you will have to enter the preload text manually at the start of the script for the activity. The Preload and run data exchange function allows executing data exchange script prior to executing the script entered for an activity.

SLA and work assignment

You can set the SLA indicators for any job or activity, and assign resources manually or automatically.

Service level agreement

Service Level Agreement (SLA) is the visual representation of a threshold status or job and activity state on a job list or work queue.

You can specify fully configurable SLA indicators for any job or activity allowing process participants to rapidly see when processes are at risk of exceeding targets, and allowing them to take corrective action if necessary.

TotalAgility supports a maximum of five statuses, which are defined at the server level. Two statuses — Green and Amber are active by default, with the option to include Red, Black and Purple. The status names, such as Red or Green are configurable.

Activity assignment

You can assign resources manually or automatically.

To automatically assign resources use allocation algorithm. An allocation algorithm allows you to find the right resource for a task and automatically assigns the task to that resource. The allocation is based on First available resource or the least expensive resource or the available resource with the highest skill level or the available resource with the highest productivity rating.

You can assign activities to a resource based on the skill level set at the time of creating a resource or the skill level set at the process level, or you may consider resources with any skill level to take the jobs.

Work queue

The maximum number of activity rows to retrieve at a time. For example, if set to 500 and if 1000 activities exist, you can retrieve only 500 rows in a work queue. (Default: 50, Maximum: 5000)

Logon and authentication

This section includes the following system settings:

- [Passwords and logon](#)
- [Multifactor authentication](#)
- [Resource extensions](#)
- [User sessions](#)
- [Federated security](#)

To open this card, navigate to **System > System settings > Logon and authentication** and then select the system setting to configure.

Password and logon

You can manage passwords and logon settings within the TotalAgility system. See the *Kofax TotalAgility Best Practices Guide* for more information on some of these options.

Password

Password format

A format that all passwords must adhere to. The password format can be a regular expression or an inline value. For example for a password format that should have minimum 8 characters at least 1 Uppercase Alphabet, 1 Lowercase Alphabet and 1 Number, the regular expression is: `^(?=.*[a-z])(?=.*[A-Z])(?=.*\d)[a-zA-Z\d]{8,}$`

Examples of regular expression for password format:

- for a password format that should have minimum 8 characters at least 1 Uppercase Alphabet, 1 Lowercase Alphabet and 1 Number, the regular expression is:

```
^(?=.*[a-z])(?=.*[A-Z])(?=.*\d)[a-zA-Z\d]{8,}$
```

Valid password examples: **PaSs1234** OR **pASS1234**

- for a password format that should have minimum 8 and maximum 10 characters at least 1 Uppercase Alphabet, 1 Lowercase Alphabet, 1 Number and 1 Special Character, the regular expression is:

```
^(?=.*[a-z])(?=.*[A-Z])(?=.*\d)(?=.*[$@!%*?&])[A-Za-z\d@$!%*?&]{8,10}
```

Valid password examples: **PaSs@123** and **pASS1234**

Password hashing algorithm

Used to verify the integrity of passwords. It includes two settings:

- **SHA-1:** Cryptographic hash algorithm (default setting for upgrades).
- **Script:** Password-based key derivation function (default setting for clean installation).

If you change the password hashing algorithm, all existing user passwords become invalid on saving the changes. Therefore, you must specify the default password, and also specify if the password must be updated for all users or only for the current user.

- **Default password:** Specify the default password. Once you save the settings, passwords for resources get updated to the default password.
- **Update password:** Specify if the password must be updated for all users or only for the current user:
 - **All users:** Updates all the users with the new password. The users can login once with that password, but are forced to change their password on next successful login.
 - **Current users only:** Updates only your own (current user) password. If you select to update password for the current user only, ensure that existing users passwords are changed manually; otherwise, they cannot login with their old passwords.

Disable logon without password

In TotalAgility on-premise, a message appears when an unauthorized user invokes any of the Logon SDK methods to acquire the session ID.

Note This setting is not available for TotalAgility running in On-premise multi-tenant and Azure environments.

Reset password notification process

Use a process (default: SYSTEM Reset Password) to reset the password when a user forgets the password and requests a reset. You can also force all users to change the password on the next logon due to a security breach or change in the password format.

Logon

Allow multiple user logons

This option allows multiple logons using the same session. For example, you can logon to both TotalAgility Designer and TotalAgility workspace, or use multiple browser Windows in the same session to logon to Kofax TotalAgility Workspace.

Logon state forms

You can associate a form with a logon state to help the form designer know which form to display next. By default, each state uses a specific form. For example the "AwaitingChangePassword" state uses the "ChangePassword.form" form.

Account lockout policy

An account is locked if unsuccessful logon attempt threshold is exceeded. The account lockout policy disables a user account if the user enters an incorrect password a specified number of times within a specified time. The lockout prevents attackers from guessing users' passwords, and decreases the likelihood of successful attacks on your network. You can define an account lockout duration. Alternatively, an administrator can manually lock and unlock accounts.

- **Maximum number of logon attempts:** The number of failed logon attempts after which a user account must be locked. A locked-out account can only be used again if it is reset by an administrator or if the lockout duration for the account has expired. You can set a value of failed logon attempts between 0 and 999. A value of 0 indicates that the account cannot be locked. (Default: 5)
- **Account lockout duration:** The number of minutes an account remains locked before automatically gets unlocked. The account lockout duration can range from 0 minutes through 99,999 minutes. A value of 0 indicates that the account will remain locked out until an administrator explicitly unlocks it. (Default: 30 Minutes)

Multifactor authentication

Multifactor authentication (MFA) is a security approach to verify the legitimacy of a user that requires more than one of the following independent authentication factors:

1. **Knowledge factor:** Something only the user knows, such as the password or security question answers.
2. **Possession factor:** Something only the user has, such as an email with a passcode or a user-specific cookie on a client computer or device.
3. **Inherence factor:** Something unique to the user, such as fingerprints or eye recognition.
After presentation, each factor must be validated by the other party for authentication to occur.

You can enable multifactor authentication independently for internal and external resources. TotalAgility supports the following authentication features for both internal and external resources.

- **Passcode:** Users logging on for the first time are requested to enter a passcode. Passcode is sent to the user through an email and has a limited validity period. On entering the active password, a cookie is

added to user's system and logon proceeds. For subsequent logon, system checks for the valid cookie. If it does not exist, user must go through the passcode verification again.

- **Password format:** To increase security, a regular expression can be supplied to ensure that any passwords added for resources must adhere to a specific format. This is an optional setting.

Multifactor authentication settings

Enable

If selected, enables configuration of multifactor authentication of internal and external users.

Passcode active interval

A period in minutes within which the user should be authenticated after the initial passcode is sent to the user. (For internal users, default: 30 Minutes, for external users, default: 30 Hours)

Cookie expiry interval

A period in days/hours/minutes so that the expiry time is calculated from the (initial) passcode activation. (Default: 30 Days, 0 Hours, 0 Minutes)

Expiry mode

The mode of expiry.

- **Absolute:** Calculates the expiry time from the (initial) passcode activation. Subsequent logons do not update the expiry time. When the expiry time is reached, the user is required to perform passcode authentication. (Default: 30 Days)
- **Sliding:** On subsequent successful logons, updates the expiry value by adding the cookie expiry duration.

Group

The group in which the user is a member. (Default: Everyone)

Note This option is not available for external users.

Notification process

A notification process. (Default: SYSTEM Passcode Notification process which contains an email node that sends an email to the resource with descriptive text and a randomly generated passcode.)

Note

- When you log on to TotalAgility as an internal or external user and the multifactor authentication is not enabled for internal and external users, the logon proceeds as normal.
- When you log on to TotalAgility as an internal user but you are not a member of the group configured for Internal Resources, and the multifactor authentication is enabled for internal users, the logon proceeds as normal.
- When you log on to TotalAgility as an internal user or an external user with valid credentials, and if no cookies are detected or the cookie has expired and the multifactor authentication is enabled for internal and external users, the Verify Passcode page appears. On the Verify Passcode page, enter the passcode details sent to you through email. Once you submit the details, a cookie with an expiry interval is added to the system, and you can login.

Resource extensions

You can extend information held in TotalAgility for all workers or groups by defining metadata at the system level. When you configure a worker or group, you can manage the values held for that supplementary information.

User sessions

A user should have sufficient access permissions to view or edit the user session settings.

Note You must [restart](#) the Kofax TotalAgility services for the settings to take effect.

Although the User session settings are displayed in an editable mode for users with read-only permissions, but they are not allowed to save the changes.

System

System session ID

Allows execution of any secure SDK call. For each installation of TotalAgility, a unique system session ID is generated. You can regenerate the system session ID or manually set its value.

Limited user session ID

Displays the default limited session ID and allows to generate a new limited user session ID.

User

Session timeout

The timeframe in hours and minutes after which the system automatically invalidates a user session. The session timeout only comes in effect when the Process Session Timeouts system task is active, and the TotalAgility Core Worker Service is running.

Batch session timeout

The timeframe in hours and minutes after which the batch times out. This interval is specifically used when performing capture-related work, such as, scanning and creating jobs, performing a Scan or Validation activity and others. (Default: 0 Hrs 30 Mins)

A "batch" is a temporary storage for all the documents/folder data changes you made when working in the capture form. If this times out, you will lose all your changes and may have to start from scratch. You will have to launch the Scan Create New Job form again or take the Scan activity or Validation activity again.

If you want Capture batches to timeout, set the appropriate value or disable the "Process Capture Timeouts" system task.

The batch can timeout independently from the session timeout. It basically indicates how long the user has to complete the capture activity. If the batch times out when performing an activity, you can still cancel the taken activity and take it again from the work queue.

Timeout warning period

The period of time before which a warning is displayed to inform that the user session is going to time out. (Default: 5 Mins)

For example, if the system session timeout=1 hour, batch session timeout=30 minutes and warning session timeout=5 minutes, and if you take a capture activity and leave idle for 30 minutes, the warning message appears after 25 minutes (5 minutes before batch session timeout of 30 minutes).

Note If you are on a Take activity form and the session times out, the activity gets cancelled if you have one session or remains taken if you have multiple sessions.

Session timeout form

A TotalAgility form that informs you that the user session has timed out and provides a link for you to log in again.

For example, when a user is on a Create new job form and does not perform any action after the session timeout message appears, the message appears until the session times out, based on the timings set in the system settings. If the user clicks OK in the message, the session is reset and the user can perform further actions on the form. Otherwise, the session times out and the user is redirected to the SessionTimeout form.

Note If you are on a Take activity form and the session times out, the activity gets cancelled if you have one session or remains taken if you have multiple sessions.

Resource idle timeframe

Determines how long the system should allow a resource to be idle before raising an event. For example, two hours after a resource declines an activity, an event can be raised to re-offer the same activity to the resource. (Default: 0 Hrs 0 Mins)

Federated security

Federated security system is an arrangement for managing identities and access to resources that span companies or security domains. It avoids identity duplication and security administration at multiple locations, and provides an easy way of managing identities and providing them with access to information and services in a trusted manner.

In a federated system, a group of organizations share identity attributes based on mutual trust and agreed-upon standards, facilitating authentication from other members of the federation and granting appropriate access to online resources. Authentication is a process to verify the identity of the users and system processes. TotalAgility uses the federated security system or claim-based identity for authentication.

Claims based identity or federated authentication is a much more flexible solution for authentication in TotalAgility Azure and on-premise. TotalAgility can leave the authentication to be done by a trusted third party identity provider and only deal with the claims returned for the authenticated user.

Claims contain multiple statements the authenticated user or organization makes about itself or another subject. For example, a statement can be about a name, group, buying preference, ethnicity, privilege, association or capability. Claim tokens are signed to verify they have been issued by the correct identity provider.

TotalAgility uses Web Services Federation Language (WS-Federation) and Security Assertion Markup Language (SAML) protocols that allow users that have already logged in to one site to access another site without logging in again. Single sign-on (SSO) is a subset of federated security system in which a user's single authentication ticket or a claim token is verified across multiple IT systems or even organizations.

An identity provider provides a Security Token Service. Examples of identity providers include:

- On-Premise: Windows Server Active Directory with AD FS 2.0 (supports SAML 2.0 and other tokens formats)
- Public Cloud: Windows Azure Active Directory
- One Login

A security token service authenticates a user and returns claims token. To better understand the concept of security token service, consider the analogy of a night club with a doorman. The doorman wants to prevent under-age patrons from entry. To facilitate this, he requests a patron to present a driver's license, health insurance card or other identification (the token) that has been issued by a trusted third party (the security token service), such as the provincial or state vehicle license department, health department or insurance company. The nightclub is thus alleviated of the responsibility of determining the patron's age. It only has to trust the issuing authority (and of course make its own judgment of the authenticity of the token presented).

By completing these two steps, the nightclub authenticates the patron to be of legal drinking age.

Similarly, the nightclub may have a membership system, and certain members may be regular or VIP. The doorman might ask for another token, the membership card, which might make another claim; that the member is a VIP. In this case, the trusted issuing authority of the token would probably be the club itself. If the membership card makes the claim that the patron is a VIP, then the club can react accordingly, translating the authenticated VIP membership claim to permission, such as the patron being permitted to sit in the exclusive lounge area and be served free drinks.

A federation provider provides a security token service that trusts other security token services (also known as a Resource security token service). A federation provider can perform claims transformation on the token received from the trusted security token service.

Examples of federation provider include:

- On-Premise: Windows Server Active Directory with AD FS 2.0
- Public Cloud: Windows Azure Active Directory, Windows Azure Active Directory Access Control.

The reply URL specified in the Federated Provider that is being used with TotalAgility should be as follows: `https://[host]/TotalAgility/FederatedLogin.aspx`. This is how the Federated Provider knows where to find TotalAgility so that it can return after authentication is completed.

In a load balanced environment, TotalAgility cannot correctly read the passed token from AD FS consistently as the load balanced servers have unique machineKey identifiers by default. To configure TotalAgility with AD FS in a load balanced environment, you must generate the machinekey and propagate it to all servers.

An application that relies on claims is a relying party application, also known as "claims aware application" and "claims-based application", for example, TotalAgility. Web applications and Web services can both be relying parties. A relying party application consumes the tokens issued by a security token service and extracts the claims from tokens to use them for identity related tasks.

In TotalAgility, you can also define user claim rules to indicate which user groups are mapped to the TotalAgility worker group, category and working category after they have been successfully authenticated by the provider.

Note Once a user is automatically added to TotalAgility after the logon to the authentication provider, any further logons will not update any settings.

See [Create a resource](#).

You can define a set of mappings to determine how an existing user in TotalAgility is found when logon is performed after the user is successfully authenticated by the authentication provider.

See [Configure the federated security](#).

System

This section includes the following system settings:

- [General](#)
- [Forms](#)
- [Email server \(SMTP\)](#)
- [Thread pools](#)
- [Whitelist](#)
- [System tasks](#)

To open this card, navigate to **System > System settings > System** and then select the system setting to configure.

General

This section describes the general settings, settings for the Transformation server and for general and system related settings.

A user should have sufficient access permissions to view or edit the general system settings. For a user with read-only permissions, the System settings dialog displays all setting in editable mode, but is not allowed to save the changes.

Note You must [restart](#) the Kofax TotalAgility services for the settings to take effect.

General

Use business calendar

Allows calculating all job durations and due dates based on the business calendar which is selected separately for each scheduled job.

Allow duplicate email addresses

Allows using the same email address by multiple resources.

If this setting is clear, you cannot create or edit (individual, group, external resource), or import a resource which does not have an unique email ID.

Enable multilingual processes

Allows opening the form in the correct locale when the browser is set to a different language.

Restrict job access

Restricts resources from accessing job properties, viewing associated milestones, variables, states, roles, history and map details.

When this setting is selected, the job is not visible in job search results. However, users can still create and restart jobs, view the work type, and take and complete activities.

Security key

Displays the default key that protects sensitive data between client and server so that variable values stored on the client machine are encrypted when viewed. You can generate a new security key if required.

Transformation server

Reject documents on exceptions

If this setting is selected, the system rejects the document or page on exceptions. If clear, the system suspends the activity on exception.

Enable custom sorting

Enables sorting of columns in work queue, System and Job list queries.

Core Worker

Auto activity reset limit

Allows you to define the maximum number of attempts to reset an automatic activity. (Default: 5)

Note For an Azure environment, the default Auto activity reset limit is 1.

Restrict looping in synchronous

Allows the process to be synchronous so that it only has automatic activities, and does not have any manual activities. If this setting is selected, you cannot set maximum loop counts.

By default, this setting is not enabled and allows you to define the Maximum loop count. (Default: 1000)

Note For an Azure environment, this setting is read-only with a default value of 10,000.

Continuous looping in a synchronous job or business rule can cause high workload on the TotalAgility server. The Maximum loop count allows you to define the number of times an activity can be executed in a synchronous job or business rule to prevent continuous looping. When the loop count reaches the defined limit, the synchronous job is suspended at runtime.

Note You can set the maximum loop count at system level or process level. The maximum loop count set at process level takes precedence over the system setting. See [Process properties](#).

Worker task retry count

Allows you to set the maximum number of retries for a worker task. If the maximum number of retries is reached, the worker task is put into an error state. (Default: 5 and Maximum: 100)

You can view the failed worker tasks from the TotalAgility Workspace and also activate or delete a worker task.

Capture data clean-up task

Operation time limit

Allows you to set the operation time limit for deleting the child capture data. (Default: 12 Hrs: 00 Mins)

Note Too large intervals between clean-up runs can lead to excessive database growth which causes increased task execution time and high load on the server. Too often clean-up task executions can lead to not optimal resources usage. Configuring the operation time limit based on the data growth rate helps in maintaining a balance between manageable data growth and the server load.

Enable custom sorting

Enables sorting of columns in work queue, System and Job list queries.

Forms

By default, some form settings are set with default values. You can change the values for those settings to suit your configuration.

Note You must [restart](#) the Kofax TotalAgility services for the settings to take effect.

Form width

Mode

The width mode for a form as **Fixed** or **Percentage** (default). When you create a new form or form template, or automatically generate a form, the width mode of the form defaults to this system setting.

The custom forms in Kofax TotalAgility Workspace are also displayed in percentage or fixed width mode according to this setting. If you change this setting from percentage to fixed or vice-versa, you must delete the deployed forms and restart the IIS to reflect the changes in the Workspace custom forms.

Note On upgrading TotalAgility, by default the width mode of the form is set to Fixed.

Caching

By default, the forms are cached on the client side browser for faster loading performance. Only the most frequently accessed forms are stored in each cache. When the form is reloaded, it is retrieved from the cache and the content is refreshed.

Note On upgrading TotalAgility, the form caching retains the original setting configured in the previous version. However, we recommend that you enable caching of forms if the same forms are going to be used repeatedly. This improves performance.

For best practices on form caching, see "Form cache" in *Kofax TotalAgility Best Practices Guide*.

Use form cache

Form caching only applies to Desktop forms.

Use document form cache

Document form caching only applies to Document forms. Improves performance when navigating to a document with a type or changing a document type to one that has already been visited during the session.

Use folder form cache

Folder form caching only applies to Folder forms. Improves performance when navigating to a folder with a type or changing a folder type to one that has already been visited during the session.

Form cache size/Document form cache size/Folder form cache size

The cache size determines the maximum number of each form type to be cached on the client side browser. As the cache size increases, more memory is used on the client machine. When the number of forms exceeds the maximum number, the least requested form is removed from the cache to add the latest.

Enable document pre-loading

If selected, TotalAgility pre-loads the documents in the background. This improves user interface responsiveness, but may result in higher server load.

By default, TotalAgility does not pre-load documents in the background. This reduces the load on server, but the user interface responsiveness may be slower.

Images and custom images

Base image URL

Location other than the default location from where the system picks up the images.

By default, the images are available in the Images folder in TotalAgility.

Note When you add an Image control to a form, the system picks the images from the base image URL set in system settings.

Image refresh duration

An interval to refresh a downloaded image from the database. (Default: 120 minutes)

Images and custom pages are stored as assets within TotalAgility and can be used in forms. When you load a form that uses a custom image or page for the first time, the item is downloaded from the database. On subsequent visits, when a form is requested that uses an image or page from the database, the forms server checks if the image or page has already been downloaded and verifies if the last modified date is greater than the current datetime plus the duration. If yes, the latest image or page is downloaded from the database refreshing the image.

Any updated image or page is then shown on a form until the duration has passed.

Custom page refresh duration

An interval to refresh a downloaded page from the database. (Default: 120 minutes)

For best practices on image refresh duration and custom page refresh duration, see "Refresh durations" in *Kofax TotalAgility Best Practices Guide*.

Capture form behavior

Confirm/validate field with TAB key

If selected, enables the use of TAB key to confirm and navigate to the next capture field if auto navigate to next invalid field is not active. Confirming or validating a capture field using Tab key improves efficiency. (Default: Clear, which means you must press ENTER then TAB to confirm and navigate to the next field.)

The auto navigate to next invalid field behavior takes precedence over the TAB key's normal behavior of navigating to the next field.

Auto-validate field after OCR lassoing

If selected, populates the field with the lassoed value and also confirms the field. (Default: Clear, which means you must press ENTER after lassoing to confirm the field.)

Highlight entire capture field text on click

If selected, automatically selects the entire contents of a field on clicking into a field. (Default: Clear)

Scroll image viewer with mouse wheel

If selected, enables scrolling in the capture activity image viewer using mouse wheel.

You can use the following key combinations for scrolling and/or zooming in the Image viewer.

- Vertical scroll = mouse wheel
- Horizontal scroll = Wheel+Shift
- Zoom = Wheel+Shift+Alt

If this setting is clear, use the following key combinations:

- Vertical scroll = Wheel+Shift
- Horizontal scroll = Wheel+Shift+Alt
- Zoom = Wheel

Default design themes

The default theme to apply to forms (desktop/mobile for touch and non-touch).

Desktop

A theme to apply for the desktop forms. (Default: Kofax TotalAgility Workspace)

Available themes are: **Classic**, **Crisp**, **Crisp Touch**, **Gray**, **Neptune**, **Neptune Touch**, **Kofax TotalAgility Workspace** and **Triton**.

Note A theme imported from an earlier version of TotalAgility 7.6.0, or available on upgrading to TotalAgility 7.6.0, defaults to Classic for the desktop forms.

Touch

A theme to apply for the touch forms. (Default: Kofax TotalAgility Workspace)

Available themes are: **iOS**, **Material**, **Neptune**, **Kofax TotalAgility Workspace** and **Triton**.

Note A theme imported from an earlier version of TotalAgility 7.6.0, or available on upgrading to TotalAgility 7.6.0, defaults to Triton for the touch forms.

Email server (SMTP)

You can configure email settings for the system to allow the email activity in a process to work at runtime. The email can only be sent if the configured details are appropriate.

For compatibility with previous versions of TotalAgility, a server variable called `SPP_SMTP_SERVER` is available in the System Category. This variable holds the name of the SMTP server. If a value is provided in this variable and no email settings have been defined within the System Settings then the SMTP server name in the variable is used when sending an email. If the email system settings are defined, then those details take preference.

Thread pools

Thread pools (TP) automate activities (including sleep) by threads in that pool. Each thread in a pool controls a separate automatic activity. Thread pools can also be associated with synchronous maps.

TotalAgility provides default thread pool for capture and non-capture automatic activities.

The default thread pool contains 16 threads; this means that TotalAgility can execute 16 automatic activities at once. Additional activities queue up on the thread pool queue (TPQ) and execute on a first-come, first-served basis. You cannot modify the name or delete the default thread pools, however, you can change their other settings, and also create multiple thread pools.

See [Add a thread pool](#).

Multiple thread pools offer the following advantages:

- Lets you put long-running activities onto a separate thread pool. This prevents long-running activities from delaying other short-running activities. For example, with two thread pools, the short running activities on thread pool 1 do not wait for completion of the long-running activities on thread pool 2.
- Control the number of concurrent calls, reduce the site size and minimize potential performance delays. This is useful where an automatic activity uses a third-party object method licensed for a limited number of concurrent calls. For example, an email server may only be able to handle 10 concurrent calls at one time. You could set up a thread pool with 10 threads to efficiently handle the processing of these automatic email activities.

Once thread pools are created, you can use these thread pools in a process.

Important Only on-premise TotalAgility supports thread pools; TotalAgility running in on-premise multi-tenant or Azure environments does not support them.

Whitelist

You can whitelist the web service URLs and the database connection strings that can be employed by TotalAgility to make web service calls or run SQL queries against TotalAgility.

This allows administrators to secure their servers by preventing connections to any arbitrary host or ports.

System tasks

System tasks are routine tasks that TotalAgility performs. You cannot create a new system task or delete a system task. You can deactivate a task, modify the interval in which to execute a system task, set

the timeout interval, and define the system task operating time, as needed. You must have necessary permissions to configure the system tasks.

TotalAgility performs the following routine tasks.

Archive Jobs	Moves archive jobs from live to archive database.
Capture Data Clean-up	Removes the child capture data orphaned during the high level delete where particular object is removed from the database and all child data is left untouched. Deleting the pending capture data in chunks grouped by object types helps to reduce the delete operation time and minimize the chances to encounter deadlocks across several tables. This significantly improves delete performance. (Default: 0 Days 24 Hours 0 Minutes)
Create Exceptions	Creates jobs on a configured exception map. Also creates jobs or alert tasks configured on triggers at the process level. Note You can configure exceptions at the server or process level.
Create Jobs	Creates jobs configured on business events.
Device Management Cleanup	Cleans up device-related data, such as expired device and old scan history records. The default schedule to run this task to clean-up the scan history is every one hour.
Evaluate Jobs	Core Worker service evaluates jobs on job creation and activity completion.
Ingest	Ingests documents from various sources (Email, Fax, FOIP, File) and creates the specified business processes.
Job Scheduling	Scheduler creates a job on the configured map. See Manage a job schedule .
KM FtpFetch	Retrieves jobs submitted to the configured FTP server from Konica Minolta devices.
License Threshold Monitoring	Determines how often to check for license threshold exceptions and raise an alert (Default: 1 minute). Once the threshold is met and the interval has passed, the exception is raised.
Monitoring	Monitors database at a set time interval and executes multiple checks, for example, whether to fire an exception or trigger.
Online Learning	Runs automatic Online Learning on the documents marked for online learning during validation. For best practices on Online Learning system task, see "Online Learning System Task" in <i>Kofax TotalAgility Best Practices Guide</i> .
Perform Auto Activities	Executes automatic activities at a set time.
Process Activities	Performs auto work allocation based on the algorithm selected.
Process Capture Timeouts	Cleans up data for expired document capture sessions in the TotalAgility Workspace.
Process Session Timeouts	Forces user logoff on session timeout.
Process State Actions	Executes action configured on states (Restart\Create New Job). See Create a state .

Reporting	Performs (extract/transform/load) of reporting data and transforms data from staging to warehouse.
Retention Policy	Marks items for deletion for which the retention period and number of versions have exceeded the defined limit, and then deletes those items. This task executes once every seven days by default; you can set the minimum interval to one hour. If the item that the system task tries to delete is not deleted, the item is recorded in the Retention Policy Failures table. Failures are cleared automatically when the system task executes the next time. See Retention policy system task . Note The Retention Policy system task is CPU intensive and should be ideally scheduled during non-working hours.
Transformation Server Execution	Performs the following automatic capture activities: Extraction, Classification, PDF Generation, Image Processing and Composite.
Upgrade Jobs	Performs upgrade of jobs for the requested process versions.
Xerox FtpFetch	Retrieves jobs submitted to the configured FTP server from Xerox devices.

See [Manage system tasks](#).

User behavior

This section includes the following system settings:

- [Scan forms](#)
- [Activity forms](#)
- [Capture configurable keys](#)
- [Capture operations](#)

To open this card, navigate to **System > System settings > User behavior** and then select the system setting to configure.

Scan form

The system populates some scan form settings with default values. You can change the values for those settings to suit your configuration.

File upload

Disable the file upload settings in the TotalAgility Designer to avoid the need to manually modify the Web configuration file (Web.config).

Maximum binary chunk size

Determines the maximum size when a single page of an image or imported file is sent to the server from the scan form.

If the page is smaller than the chunk size, the complete page is sent; otherwise, the page is split into chunks. (Default: 10240 Kilobytes)

Maximum number of upload requests

Sets the number of concurrent upload requests.

The chunked image upload is slower than whole image upload with the same number of concurrent upload requests. Increasing the number of upload requests increases performance. (Default: 2, Minimum: 1 and Maximum: 2147483647)

Note You can configure the Maximum binary chunk size and Maximum number of upload requests settings on a per tenant basis.

Set Kofax VRS elite profile from scan profile name

By default, sets the VRS Elite profile based on the assigned TotalAgility Scan/VRS profile in the Scan Client, so that you need not rely on scan operators to select the correct VRS Elite profile. This setting only applies to "Scan create new job" and "Scan activity" forms, and does not apply to the "Web Capture" forms.

Note

- When you create a TotalAgility Scan/VRS profile with some name on the server and create Kofax VRS Elite profile with the same name on client machine, and configure the Scan Client to work with created Scan/VRS profile, specific VRS Elite scanner profile loads automatically. That is, when the operator begins using the Scan Client scan with VRS Elite scan source and selects the VRS/VRS profile with matching name, Kofax VRS Elite will use corresponding VRS Elite profile during scan. The connection between the profiles are only names. The settings from the Kofax Scan/VRS profile are not applied to VRS Elite profiles.
- When you upgrade from previous versions of TotalAgility 7.4.0.1, this setting is not selected by default.
- If corresponding VRS profile does not exist or there is an error selecting this profile, the Scan Client ignores this and continues scanning without setting VRS Elite profile.
If VRS Elite profile was already selected, this profile remains selected even if you select another Scan/VRS profile which does not have a corresponding VRS Elite profile.

Scan/VRS profile

Set Kofax VRS elite profile from scan profile name

By default, sets the VRS Elite profile based on the assigned TotalAgility Scan/VRS Profile in the Scan Client, so that you need not rely on scan operators to select the correct VRS Elite profile.

This setting only applies to Scan create new job and Scan activity forms, and does not apply to the Web Capture forms.

Activity forms

For the generic activity forms that are system generated, you can display the "Save" and "Complete and next" buttons at runtime when you take the activity. You can also specify the behavior for end of capture activity, and allow rotating a page without losing OCR data and field data associated with the page.

Activity forms

Allow save

If selected, displays the "Save" button when you take the activity. The Save button allows you to save the activity changes to your work queue at runtime.

Allow complete and next

If selected, displays the "Complete and next" button at runtime when you take the activity. This button allows you to complete the current activity and take the next activity from your work queue.

Note The "Allow save" and "Allow complete and next" options are only available for the generic take activity forms that are system generated.

End of capture activity behavior when valid

Show activity settings

Shows the Activity settings dialog box button on the Document Review, Verification, and Validation forms.

End of activity

The behavior that can be set for end of capture activity:

- Keep the activity open once the activity is completed.
- Prompt you before automatically completing the activity. (Default)
- Automatically complete the activity without prompting you.

Image rotation

Preserve OCR data on rotate

If selected, enables rotating a page without losing OCR data and field data associated with the page.

Capture configurable keys

Customize the hotkeys associated with commands within the Capture Client control to use both single and double key sequences suited to customer preferences.

You cannot delete a command or modify the name of a command. However, you can customize the hotkeys for a command to increase flexibility.

Note When you customize the hotkey for a command in an on-premise environment, you must restart the IIS Application Pool for the changes to take effect.

TotalAgility provides the following default hotkeys for commands.

Command	Hotkey	Command	Hotkey
Activity Settings	CTRL then SHIFT+S	Next Page	CTRL then B
Best Fit	CTRL then 1	Next Problem	CTRL then Q
Cancel Activity	CTRL then X	Next Rejected Document/ Page	CTRL then ALT+P

Command	Hotkey	Command	Hotkey
Change Document type	CTRL then T	Next Tab	CTRL then CTRL+K
Collapse/Expand the Bottom Panel	CTRL then UP ARROW	Online Learning	CTRL then SHIFT+L
Collapse/Expand the Current Error Panel	CTRL then DOWN ARROW	Override Problem	CTRL then W
Collapse/Expand the Left Side Panel	CTRL then LEFT ARROW	Previous Document	CTRL then SHIFT+P
Collapse/Expand the Right Side Panel	CTRL then RIGHT ARROW	Previous Folder	CTRL then SHIFT+K
Complete Activity	CTRL then C	Previous Page	CTRL, SHIFT+B
Complete and Take Next Activity	CTRL then Y	Previous Problem	CTRL then SHIFT+Q
Confirm Document Type	CTRL then SHIFT+T	Previous Rejected Document/Page	CTRL then ALT+SHIFT+P
Create Job	CTRL then SHIFT+C	Previous Tab	CTRL then CTRL+J
Display Sticky Notes	CTRL then E	Reject Document	CTRL then R
First Document	CTRL then F	Reject Page	CTRL then SHIFT+R
First Folder	CTRL then J	Replace Page	CTRL then U
First Page	CTRL then A	Restore Problem	CTRL then SHIFT+W
Fit Page to Height	CTRL then 3	Revert View	CTRL then SHIFT+DOWN ARROW
Fit Page to Width	CTRL then 2	Rotate Displayed Image 180	CTRL then M
Force Valid	CTRL then V	Rotate Displayed Image Left	Ctrl then G
Get Source File Note This command is disabled for upgraded forms.	CTRL then SHIFT+O	Rotate Displayed Image Right	CTRL then SHIFT+G
Go to Document Type	CTRL then 7	Rotate View 180	CTRL then SHIFT+UP ARROW
Go to Fields Panel	CTRL then 6	Rotate View Left	CTRL then SHIFT+LEFT ARROW
Go to Image	CTRL then 8	Rotate View Right	CTRL then SHIFT+RIGHT ARROW
Go to Navigator	CTRL then 9	Scan All Sheets/Import Files	CTRL then O
Go to Thumbnails	CTRL then 0	Scan One Sheet	CTRL then S
Help	CTRL then H	Set Field to Not Verified	CTRL then SHIFT+V

Command	Hotkey	Command	Hotkey
Insert Pages	CTRL then I	Show Page Source Image	CTRL then ALT +0
Lasso Zoom	CTRL then L	Show Rendition Image 1	CTRL then ALT +1
Lasso Zoom Lock Mode	CTRL then ALT+L	Show Rendition Image 2	CTRL then ALT +2
Last Document	CTRL then SHIFT+F	Show Rendition Image 3	CTRL then ALT +3
Last Folder	CTRL then SHIFT+J	Show Rendition Image 4	CTRL then ALT +4
Last Page	CTRL then SHIFT+ A	Show Rendition Image 5	CTRL then ALT +5
Merge Document	CTRL then SHIFT+M	Split Document	CTRL then D
Next Document	CTRL then P	View or Change Scan Settings	CTRL then SHIFT+E
Next Folder	CTRL then K	Zoom In	CTRL then +
Next Invalid Field	CTRL then N	Zoom Out	CTRL then -
Next Not Verified Field	CTRL then SHIFT+N		

The hotkeys apply to actions for all form types: Scan, Validation, Verification and Document review.

TotalAgility supports single key and double key:

- **Single key:** CTRL /ALT/SHIFT (Combination) + Key. For example, CTRL+ALT+S.
- **Double key:** CTRL then CTRL /SHIFT/ALT (Combination) + Key. For example, CTRL then CTRL +SHIFT+S.

Note TotalAgility does not support a browser defined hotkey, such as CTRL+C which is the default command for copying.

See also:

- [Manage capture configurable keys](#)
- [Excluded shortcut keys](#)

Capture operations

You can assign access permissions to resources and groups to permit or restrict access to each capture action within a capture composite control.

The following table describes the purpose of each capture action.

Action	Purpose
Documents	
Reject documents	Rejects the documents if the fields are not valid. For example, if the image is smudged and illegible or the value on the image is not valid.
Delete documents	Deletes a document, that was scanned in error, is no longer required, or is a duplicate.

Action	Purpose
<p>Change document type</p>	<p>Changes the type of document.</p> <p>Note Since masking of field group and activity variant is based on document type, changing it results in loss of masking based on some of the fields. Changing the document type back to the original does not restore the masking, as field data and associated words are lost when the document type is changed. Also, trying to link fields to words is not possible as the fields that specify masking are hidden. Masking on the image does not clear immediately since the page is not dynamically updated and the masks are removed the next time the image is retrieved in either the current or next activity.</p>
<p>Split documents</p>	<p>Moves a variable number of pages from an existing document into a new document. When documents are scanned using duplex mode, TotalAgility tries to keep the front and back image of a single paper together.</p> <p>You should have permission to split a document; otherwise, it will prevent from splitting the front or back pages of the document.</p> <div data-bbox="501 831 1624 1352" style="border: 1px solid #ccc; padding: 5px;"> <p>Document: (15)</p>  </div>
<p>Split on back page</p>	<p>Separates the back page of a duplex page pair and place it in a new document. Once split, both the front and back page of a duplex page pair appear as a normal simplex page.</p> <p>You should have permission to split a document on back page otherwise it will prevent from splitting of the back pages.</p>
<p>Merge documents</p>	<p>Merges two or more different documents.</p> <p>Note When you upgrade TotalAgility, the "Merge documents" permission is only enabled if the "All other batch-editing operations" permission is selected.</p>
<p>Pages</p>	
<p>Reject pages</p>	<p>Rejects the pages of a document.</p>
<p>Delete pages</p>	<p>Deletes a page, that was scanned in error, is no longer required, or is a duplicate.</p>
<p>Rotate pages</p>	<p>Permanently rotates the pages of a document.</p>

Action	Purpose
Folders	
Add folder	Add folders.
Delete folders	Delete a folder that is no longer required, or is a duplicate.
Other	
Annotations	Maintains document annotations.
Online learning	<p>Selects the documents for online learning.</p> <p>Note The Online learning is a mechanism to better find and extract content on a page of a document. Dynamically trained content is added to a dynamic knowledge base, until it is finally reviewed and published to a published (static) knowledge base. The Online Learning option only applies to a Validation activity.</p>
Override problems	Overrides a field, if it cannot be corrected or correcting it can be time consuming.
All other batch-editing operations	Performs general functions such as moving pages, documents and folders.
Web capture mask and redact	<p>Grants a resource or a member of a resource group the ability to mask in the Web capture control.</p> <p>Note The Administrators group has the mask image rights by default.</p>
SDK only	
Create documents and pages	Creates and copies documents and pages using the CaptureDocumentService SDK.
Modify/read documents	Modifies and adds documents, pages, updates fields for folder or document using the CaptureDocumentService SDK. Also, allows SDK users to read capture data, such as retrieving documents, document fields and images.
Confirm fields	Performs validation, and changes the document or folder field status using the CaptureDocumentService SDK.
Mask and redact images	<p>Masks images using the following CaptureDocumentService SDK.</p> <p>Available mask related CaptureDocumentService SDK methods include:</p> <ul style="list-style-type: none"> • AddPageMaskForField: Adds mask to a page for word associated to specified field. • AddPageMaskForRegion: Adds mask to a page to specified rectangular area. All the obscured words are removed from the page. • GetAllMaskedWords: Returns all words masked in a page • GetAllPageMasks: Returns all explicit mask associated with a page. • RemoveAllMasks: Removes all masks for a specified page. • RemovePageMasks: Removes masks that intersect the specified rectangular area.

License servers and statistics

For TotalAgility on-premise, you can view the license servers associated with your system and configure additional license servers as backup. You can also reactivate the license on your primary server and backup server if it is about to expire.

Note For Designer in an on-premise multi-tenant or Azure environment, the option to activate or reactivate the license is not available; the license is reactivated automatically.

TotalAgility displays the primary license server and backup license server details (if installed). You can set threshold values for a primary server so that you are able to take corrective actions before running out of volume. If the primary server license fails to connect, the system automatically uses the backup server license. You cannot set threshold values for a backup server.

Configure the following system settings in this section:

- [Configure a backup license server](#)
- [Reactivate license on primary](#)
- [Reactivate license on backup](#)
- [Set threshold for a primary server](#)
- [Set threshold for a backup server](#)

To open this card, navigate to **System > System settings > License servers and statistics** and then select the system setting to configure.

Capture

This section includes the following system settings:

- [Page renditions](#)
- [Configure capture groups](#)
- [Devices](#)
- [Web capture service](#)

To open this card, navigate to **System > System settings > Capture** and then select the system setting to configure.

Page renditions

Use page renditions to save multiple versions of an image in TotalAgility.

You can keep the original image intact and create a binarized version of the image to transform, to improve performance. For example, in medical claims, you can display the overlaid version of the image and the original image to the user simultaneously.

You can associate multiple images with a single page and provide a way to quickly switch among these images.

You can configure page renditions for a capture-enabled process and for the Scan, Image processing, Export, Validation, Verification, Document review and Composite activities.

The Scan, Validation, Verification and Document review forms support the multiple page image renditions.

Number of rendition images

The number of rendition slots. (Default: 0, Maximum:5)

Whatever number you specify in this field, that many rendition slots with default name (such as, Page Rendition_1, PageRendition_2) are created in the table, in addition to the existing Page Source Image slot. For example, if the number of rendition images is two, each page can have up to three versions of an image: "Page Source Image," "PageRendition_1," and "PageRendition_2."

Note If you reduce the number of rendition images, the last rendition is automatically removed.

You can edit the default page rendition names:

1. Double click the rendition, or select a rendition from the table and click #.
The **Name** field displays the default rendition name.
2. Enter a different name for the rendition and click **OK**.
This name is reflected in the toolbar icon tooltips and default image options at runtime.
3. Rename other renditions as needed.

Default displaying image

The default image slot the Capture user interface should display.

Note The default displaying image slot can be one of the defined page renditions, or the Page Source Image slot. If the selected default image is not available, the Page Source Image is used.

Capture groups

TotalAgility provides synchronous classification and extraction capabilities that reduce response time and improve performance by storing and processing documents data in memory. A user has the option to persist this data into the document repository after classification and extraction.

TotalAgility supports real time transformation and optimizes performance by:

- Supporting a configuration mode in the Transformation Server that does not poll for pending capture activities and is only used for synchronous processing.
- Allowing the Transformation Server to preload specific Transformation projects.
- Bypassing folder and document structure validation rules.

To use real time transformation, you must select the **Real Time Transformation Service** mode during the TotalAgility installation.

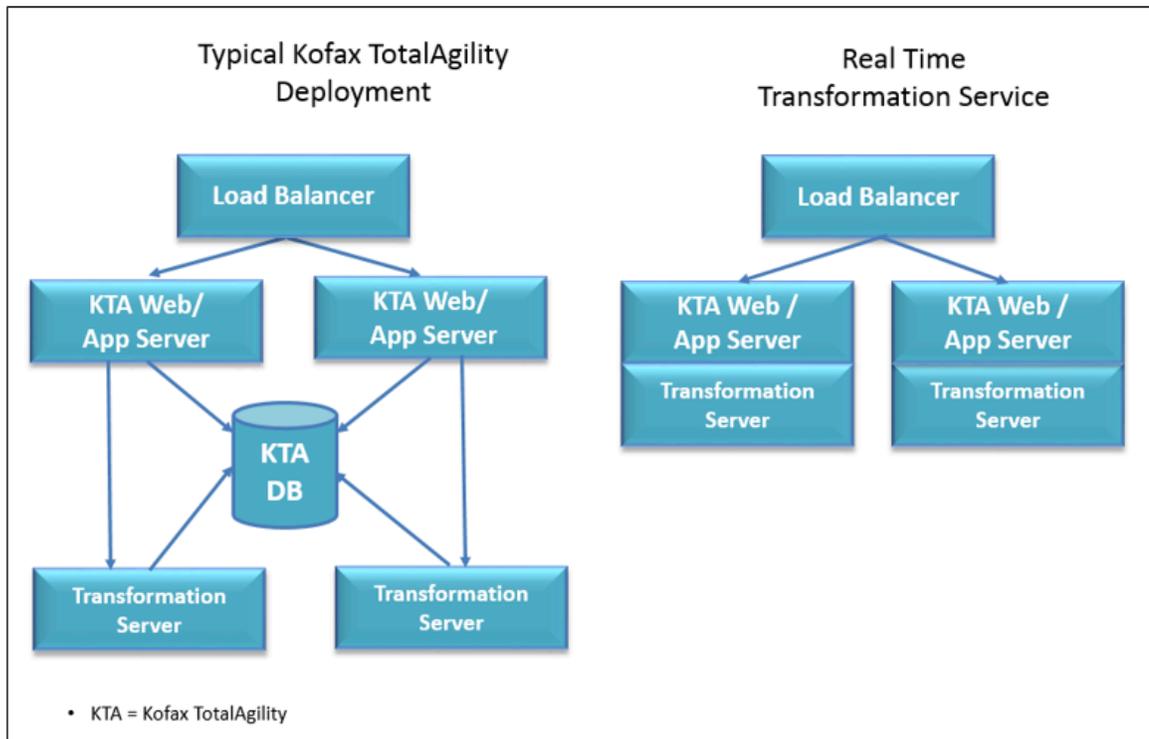
In the TotalAgility Designer, preload specific Transformation projects.

See [Configure the capture groups](#).

The Real Time Transformation Service is supported by two TotalAgility SDK APIs: CreateJobSyncWithDocuments and CreateJobSyncWithDocument. Refer to the SDK documentation for more information on these APIs.

When using TotalAgility for real time transformation, you must do the following:

1. Set up a separate set of dedicated WebApplication servers for processing. These servers are only used for real time transformation and can point to an existing TotalAgility deployment database as illustrated in the following figure.



2. Install a separate load balancer to route requests to dedicated synchronous processing TotalAgility WebApplication servers.
3. Install a Transformation Server instance on each TotalAgility application server used for real time transformation synchronous processing.

Note All requests for CreateJobSyncWithDocuments will call the residing on the TotalAgility Application server (the localhost).

4. Optional. To modify the default port for the Transformation Server, do the following:
 - a. Configure the port for the service in the Transformation Server app config file as:


```
<add baseAddress="net.tcp://localhost:9001/TransformationServerExternalService"/>
```
 - b. Specify the same port in the TotalAgility Web server Web.config as:


```
<add key="TSExternalServicePortForSyncProcessing" value="9001"/>
```

Devices

You can maintain Kofax TotalAgility device application settings for multi-function peripherals (MFPs) and mobile devices. Settings include device registration, application download and deployment, device profiles and other advanced settings.

Navigate to **System > System settings > Capture > Devices**.

The Devices screen opens in a new browser tab where you can maintain settings for multi-function peripheral (MFP) and mobile devices.

You can configure TotalAgility to work with phone devices.

Configure TotalAgility to work with a phone device

1. Configure the Scan/VRS profile with the following settings:
 - **Name:** For example, Mobile Bitonal.
 - **Color:** Black and white
 - **Image enhancement settings:** Selected
 - **Deskew:** Selected
 - **Auto crop:** Selected
 - **Auto rotate:** Selected

See [Create a scan/VRS profile](#).
2. To get the attached documents back to your email, [configure the email settings](#).
3. [Restart](#) the TotalAgility services or reboot the server.

Access control list

In TotalAgility, you can manage access permissions to grant privileges and restrict resource access to TotalAgility Designer, Transformation Designer, different areas of TotalAgility, capture actions and devices.

You can assign permission to one or more resources to permit or restrict access to the following:

- Different areas of TotalAgility, such as processes, business rules, persona.
See [Assign access permissions to different areas of TotalAgility](#).
- Designer
See [Assign access permissions for Designer](#).
- Transformation Designer
See [Assign access permissions for Transformation Designer](#).
- Devices
See [Assign access permissions for devices](#).
- Each capture action within a capture composite control
See [Assign access permissions for capture actions](#).

Note

- By default, the **Administrators** group has full control access to Settings and Job clear down, **Device Users** group has full control access to Devices, and the **Designers** group has full control access to the following areas: Designer, Process, Business rule, Work type, Resource, Persona, Capture design and Lock status search.
- If you deny permission to any group a user belongs to, the user is denied access to that permission. This is true even if the user is given the permission in a different group. For example, if you have full access from one group that you are a member of, and read-only access from another, then you can only read, not write.

For best practices on access permissions, see "Access permissions" in *Kofax TotalAgility Best Practices Guide*.

Chapter 12

Packages

Use a package to predefine the items for your Smart Process Application (SPA).

A package typically implements a Kofax TotalAgility solution for an industry vertical. A package can include the items related to processes, forms, DLLs, resources, data, business monitoring, and system. Additionally, you can include a package within a package and also add miscellaneous files to a package. Every time you save a package, a new version is created. Versioning helps a solution designer in tracking changes to the package. You can move a package from one TotalAgility deployment to another together with its constituents and quickly deploy it without much user intervention. You can only include an item once in a package and cannot include duplicate items. You can delete any referenced item.

You can export the latest version of all the package items at once and import them into another system. The package definition is saved so you can easily export the same items again.

A package can include the items listed in the following table.

Processes	Custom DLLs	Lookups	Document conversion profiles
Case definitions	Resources (groups, individuals) Note You cannot include external resources.	Regular expressions	Separation profiles
Case fragments	Allocation rules	Job queries	Miscellaneous files
Business rules	Personas	Work queue queries	Packages
Forms	Checklist templates	System queries	Server variables
Custom pages	Checklist items	Alerts	Global variables
Images	Classification groups	Events	Web services
Navigation menus	Document templates	Targets	Device settings
Sites	Entities	Categories	Transformation settings
Style sheets	Extraction groups	Job schedules	Export connectors
Themes	Folders	PDF generation profiles	
Form templates	Formatters	Scan/VRS profiles	

You can manage a package in the following ways:

- Automatically add all or selected associated items related to processes, forms and categories to a package. The items that already exist in the package are overwritten.

- Select the items to exclude from the package. On saving the package, the package data is saved in the TotalAgility database.
- You can quickly add commonly used items or specific item types from a selected artifact to the package, or search for the items that have been modified since a specific date or time, or between certain periods so you can quickly add all or individual items to the package.
- Upgrade from one version to another by importing a package. The non-versioned items, such as, checklist, lookups, Scan/VRS profiles, PDF profiles, custom pages, localization strings, personas, formatters and others get overwritten if they already exist on the target system.
- Compare a package with the system package or with other packages to view the items that have changed between versions. The items which are different and new in the selected packages are highlighted.
- Create a copy of a package.
- Open, modify and delete an existing package.
- Add miscellaneous files such as installation guide or other items that may be useful for using the package.
- Assign access permissions to one or more resources to grant access to the package. Resources with at least Read permissions can access a package.
- Export a package for reuse.
- Import entire package or the selected items to TotalAgility.
- Create different deployment configurations for a package to allow the user to define different values for global variables, server variables, web service integrations, device settings (Kofax Front Office Server settings), transformation settings and export connector settings based on different types of deployment targets, such as test and production environments. During import it allows user to overwrite the values based on the selected deployment type when exporting the package.
- Protect all or certain items (supported item types listed below) of a package to prevent other users from viewing or modifying them when they are imported into another machine. On upgrading TotalAgility, the system treats all items within the existing packages as unprotected.

You can only protect the following types of artifacts in a package: Processes, Forms, Form templates, Business rules, Classification groups, Extraction groups and Folders.

You cannot do the following for the protected items:

- Grant maintenance access on the protected item when importing a protected item into a target environment. However, it has no impact on the item on the source server.
- Open or modify these items but can consume them (including in a package).
- Modify the maintenance access on these items when exported and imported into another machine either individually or as part of a package.
- View the protected items, such as classification or extraction group, in the Transformation Designer.

Note When viewing the package configuration on the target server, the protected settings are not retained even though the items are protected within that system.

See also:

- [Create a package](#)
- [Properties of a package](#)
- [Add items to a package](#)

- [Add a deployment configuration to the package](#)
- [Package export options](#)
- [Miscellaneous files](#)
- [Work with packages](#)
- [Compare packages](#)

Chapter 13

Integrate with other systems

TotalAgility can access web services to connect to third-party software applications, connect to relational databases, and use external assembly components within a .NET activity or action.

You can define settings to integrate TotalAgility with external applications and services, such as Microsoft SharePoint, Microsoft Dynamics AX, Micro Focus Content Manager, and CMIS.

Web service references

Use the Web service references to connect to the third-party software applications, regardless of how each web service is implemented. For example, TotalAgility can integrate with a web service that automatically validates a credit card number or retrieves delivery information from a transportation company for a dispatched order.

When creating a Web service reference, you can specify custom headers so that the custom header is passed to the Third party web service when the corresponding Web Service or Restful node is executed. A custom header consists of a name and value pair, such as Host: localhost, where Host is the name and localhost is the value. All SOAP, SOAP WCF and RESTful web services support custom headers.

You can reuse the existing web service proxies and proxy file names for any web service references used by TotalAgility processes, forms or packages. Web service proxies are dynamically created at run time.

When the proxy cannot be created for the web reference, when you import a process map, the reference is still imported and the following message appears: "Web Service failed to create proxy DLL. To fix the issue regenerate client proxy."

When you import processes, forms or both using packages, if a new web service reference has the same name as an existing web service reference, a message appears.

See also:

- [Web services supported by TotalAgility](#)
- [Use a web service](#)
- [Create a web service reference](#)

.Net assemblies

.Net assemblies enable you to use external assembly components within a .Net activity or action.

TotalAgility provides a number of assembly paths out of the box, under the TotalAgility SDK. You can use the custom build assemblies that might reference other assemblies.

See also:

- [Add a .Net assembly](#)
- [Use a .Net assembly in a store](#)
- [Maintain a .Net assembly](#)

RPA

RPA (Robotic Process Automation) is a platform for application integration and process automation. Integrate TotalAgility with RPA to execute a RPA robot from within a process or a form.

RPA can integrate applications that were not built to be connected, and automate processes across such heterogeneous systems; cloud/SaaS applications with premise systems, legacy systems with modern web applications or back office systems with partner websites.

Within the RPA product suite, the user can define robots. A robot is an automated workflow designed to accomplish a task involving a data source, such as a website, or an Excel document, or a database. After you integrate TotalAgility with RPA, you can execute a RPA robot from within a process or a form.

See [Integrate TotalAgility with RPA](#).

Insight

You can integrate TotalAgility with Insight to define and deliver reports, dashboards and business analysis on demand.

For TotalAgility Azure, install Insight for each tenant and using SSL. For more information, see *Kofax Analytics for TotalAgility Administrator's Guide*.

See [Integrate TotalAgility with Insight](#).

SignDoc

SignDoc provides solutions for digital capture, management and verification of signatures to accelerate business processes, eliminate errors and protect documents against manipulation.

Integrating TotalAgility with SignDoc simplifies information intensive customer interactions to ensure a fully digital, streamlined and secure experience.

See [Integrate TotalAgility with SignDoc](#).

KCM

KCM (Kofax Communication Manager) allows you to define, create, manage and distribute customer communication documents.

By integrating TotalAgility with the KCM product, you can do the following:

- Leverage templates defined in KCM and invoke document creation from TotalAgility.
- Create documents on-demand (through a process) or interactively (through a form)
- Pull data from disparate systems using TotalAgility and pass to KCM to generate documents.
- Review or re-generate documents before distribution.
- Distribute documents as part of the composition step or at a later date.
- Distribute documents for eSigning using SignDoc.

See [Integrate TotalAgility with KCM](#).

Import settings

You can configure TotalAgility to receive documents through POP3, IMAP, SMTP, MS Graph, fax servers, folder and Exchange Web Services. Each external system has configuration settings that create TotalAgility processes when business documents are received.

Note Import settings are only available for TotalAgility on-premise; Import settings are available in the Azure environment only via the on-premise Integration Server.

You can configure the import source settings on the TotalAgility Integration Server in the same way as you would do in TotalAgility on-premise. When the event is raised on the Integration Server, the action is executed on Azure.

Active import sources or passive import connection settings are supported.

Active import sources

The active import sources run as services within TotalAgility to accept messages sent from external systems. You can only configure one import source type for each import connection.

Active import sources include:

- Simple Mail Transfer Protocol (SMTP)
- Fax Over Internet Protocol (FoIP)

When you configure the import connector for email, you can create a document directly using the email body. The mime type of the resulting document is determined by the email format (text, RTF, HTML):

- If the email body is formatted as text, you can perform classification or extraction on that document. After performing image processing on the document, you can view the document in any of the Capture Client activities.

- If the email body is formatted as RTF, provide customization to convert the RTF document to a supported format prior to submitting to a capture activity.
- If the email body is formatted as HTML, after processing image on the document, you can perform classification or extraction on the document or view the document in any of the Capture Client activities.

Passive import sources

Passive import sources are polled by TotalAgility to retrieve messages. You can configure one or more import connections with a Message Connector. Each import connection contains settings for the Message Connector and one or more import sources.

Passive import sources settings include:

- Post Office Protocol (POP3)
- Internet Message Access Protocol (IMAP)
- Exchange Web Services (EWS)
- Fax
- File

Metadata for all import sources

See the following table for metadata available for all import sources.

Metadata	IMAP/EWS/POP3/SMTP/MS Graph	External Fax Server/FOIP	File
Archive Folder	Path to store the archived messages.	Path to store the archived messages.	Path to store the archived messages.
Error information	The description of the error in case of a partially or not imported file.	The description of the error in case of a partially or not imported file.	The description of the error in case of a partially or not imported file.
Error Level	The status of an imported file; 0=imported, 1=partially imported and 2=not imported.	The status of an imported file; 0=imported, 1=partially imported and 2=not imported.	The status of an imported file; 0=imported, 1=partially imported and 2=not imported.
Fax Extension		The fax extension to which the fax has been originally sent.	
Fax User		The fax user to which the fax has been originally sent.	
File Path			Folder path of the file.
File Name			File name
From, To, Body, Bcc and CC	Components of an email.		Components of an EML or MSG file.
From Fax Number		The fax number from which the fax has been sent.	

Metadata	IMAP/EWS/POP3/SMTP/MS Graph	External Fax Server/FOIP	File
Message Import Folder	Folder or the sub folder name from where the messages are polled. For example, if the polled folder is "Inbox" and sub folder is "sub1", then this field contains "Inbox/sub1".		
Import Source Address	The mail box name configured in TotalAgility. For example, the final routed email address for SMTP email.	The fax number configured in TotalAgility. For example, the extension number for FOIP.	The watch folder name configured in TotalAgility.
Import Source Type	EMAIL	FAX	FOLDER
Import Source Recipients	The comma delimited list of To and CC recipients.	Original fax number.	The watch folder name configured in TotalAgility.
Input Source Type	The type of input source. For email, it is POP3, IMAP, SMTP, or EWS.	The type of input source. For fax, it is BISCO, RightFax or KCS.	The type of input source. For file import, it is folder.
Message Attachment List	The file names of the message attachments delimited by ';'		The file names of the documents delimited by ';'
Message Correlation	The correlation information of the message (for internal use).	The correlation information of the message (for internal use).	The correlation information of the message (for internal use).
Message Delivery Priority	The priority of the message. Reserved for future use. Set to static value 1.	The priority of the message. Reserved for future use. Set to static value 1.	The priority of the message. Reserved for future use. Set to static value 1.
Message Delivery Type	The delivery type of the message. Reserved for future use. Set to static string TO.	The delivery type of the message. Reserved for future use. Set to static string TO.	The delivery type of the message. Reserved for future use. Set to static string TO.
Message General File Name		The file name of the document. For fax server, this returns the server internal file name of the fax message.	
Message ID	The unique ID assigned by the Message Connector to a message on arrival.	The unique ID assigned by the Message Connector to a message on arrival.	The unique ID assigned by the Message Connector to a message on arrival.
Message Original Recipients		Contains a list of the original recipients as specified by the fax originator.	

Metadata	IMAP/EWS/POP3/SMTP/MS Graph	External Fax Server/FOIP	File
Message Originator Name	The full name of the message originator. For SMTP/POP3/EWS/IMAP, it is the originator's display name (mime-header/from/mailbox/displayname).	The full name of the message originator. For faxes, this is the TSI.	The full name of the message originator. For SMTP/POP3/EWS, it is the originator's display name (mime-header/from/mailbox/displayname).
Message Originator Number	The originator email (mime-header/from/mailbox/address) for POP3/SMTP/EWS mail.	The fax number of the originator (caller ID).	The watch folder name configured in TotalAgility including the file name.
Message Originator Service	EMAIL	FAX	FOLDER
Message Owner Reference	The mime-header or message ID of emails.	The server-specific message ID.	The mime-header or message ID of EML or MSG files.
Message Reception Caller Id		The fax number of the sending fax machine.	
Message Importing Error	If the message is rejected by TotalAgility, it contains the error message.	If the message is rejected by TotalAgility, it contains the error message.	If the message is rejected by TotalAgility, it contains the error message.
Message Reception Time Created	The time when message was retrieved by the Message Connector. Note For emails, we recommend to use the Message Reception Time Received field.	<ul style="list-style-type: none"> Biscom/Right Fax: The start time of fax reception. KCS: The time when the fax server started receiving the message. Note For Biscom and Right Fax, the Message Reception Time Created and Message Reception Time Received fields return the same value. We recommend to use the Message Reception Time Received field.	The time when message was retrieved by the Message Connector. Note For folder, we recommend to use the Message Reception Time Received field.
Message Reception Time Received	The time when message was retrieved by the Message Connector.	<ul style="list-style-type: none"> Biscom/Right Fax: The start time of fax reception. KCS: The time when the fax server finished receiving the message. 	The time when message was retrieved by the Message Connector.

Metadata	IMAP/EWS/POP3/SMTP/MS Graph	External Fax Server/FOIP	File
Message Recipient Name	The full name of the message recipient. For POP3, this is the mailbox display name.	The full name of the message recipient.	The full name of the message recipient in EML or MSG file.
Message Recipient Service	The service name of the recipient. For email import, it is "EMAIL".	The service name of the recipient. For fax import, it is "FAX".	The service name of the recipient. For file import, it is "FOLDER".
Message Routing Number	<ul style="list-style-type: none"> SMTP: Active email recipient. POP3/IMAP/EWS: Mailbox user name. 	The extension or called party number.	Full path of the imported file.
Message Suspected Duplication	Reserved for future use. Set to static value 0.	Reserved for future use. Set to static value 0.	Reserved for future use. Set to static value 0.
Pages		The number of fax pages in the message.	
Time Created	The date and time when the message was retrieved.	The time when the fax server received the message.	
	<p>Note If you are currently using this field, we recommend to use the Message Reception Time Created field.</p>		
Time Posted	The date and time information of an incoming message. If the message does not contain date and time information, TotalAgility uses the current date and time.		
XML DATA			The root XML document, that is, the complete XML document that has been recognized as an XML type (usually the first XML document in the email or the first XML document in the folder or the XML document that has been used as trigger file).
Subject	Subject of an email.		Subject of an EML or MSG file.

See also:

- [Configure the import connection settings](#)
- [FOIP server settings](#)

- [SMTP server settings](#)
- [Import sources](#)

Linked servers

You can define a two-way link between two separate TotalAgility installations (on-premise, on-premise multi-tenancy or Azure) and move documents between the linked servers to facilitate high-speed remote scanning.

Linked servers can consist of a combination of on-premise, on-premise multi-tenancy and Azure. However, on-premise multi-tenancy to Azure and vice versa is not supported.

In a distributed environment (separate Application and Web server), the current and/or Target URLs must reference the Web server.

In an on-premise multi-tenant and Azure environments, the current and/or target URLs must reference the tenant.

- In an on-premise multi-tenant: <tenant_name>.<WebServerFQDN>/TotalAgility
- In Azure: <tenant_name>.<AzureServerFQDN>

For more information about License proxy installation see *Kofax TotalAgility Installation Guide*.

See [Link the TotalAgility servers](#).

Micro Focus Content Manager

TotalAgility provides comprehensive out-of-the-box integration to the Micro Focus Content Manager system.

Note Micro Focus Content Manager is only available for TotalAgility on-premise; it not available for Designer running in On-premise multi-tenant and Azure environments.

Integrating TotalAgility with Micro Focus Content Manager helps users to efficiently manage electronic documents and records throughout the entire life cycle of a document—from creation to destruction.

You can connect to one or more Content Manager systems and access one or more file plan locations in Content Manager.

To connect to a Content Manager system, do the following in TotalAgility:

- Provide a name that helps you identify to which Content Manager System you are connecting, for example, London Server.
- Specify the TotalAgility Web Service that will link TotalAgility to the Content Manager system, for example, `http://TRIMSystem/TRIMIntegrationWS/TRIMIntegrationWs.asmx`.
- In the Content Manager Fileplan shortcut, provide a location to use in workflow and forms creation, for example, Accommodation - Domestic - General.

Note A file plan shortcut is a Classification system that stores records according to subject or by function. File plan shortcuts provide a standard naming and coding system for the titling of records. A consistent titling scheme allows more accurate and rapid retrieval of records from the Content Manager dataset.

See also:

- [Link TotalAgility to Micro Focus Content Manager system](#)
- [Configure TotalAgility actions resulting from Micro Focus Content Manager events](#)
- [Search for documents in a Micro Focus Content Manager system](#)

CMIS

The Content Management Interoperability Services (CMIS) is a standard that provides interoperability between ECM systems. CMIS is designed to be layered on top of existing Content Management systems and the related programmatic interfaces. CMIS defines a generic universal set of capabilities provided by a Content Management system and a set of services for working with those capabilities.

Different organizations use different Enterprise Content Management (ECM) systems to suit their requirements and budgets. Each ECM system has its own design and architecture, standards, and method of interacting with other systems. Therefore, it is often difficult to build a single tool that interacts with the various ECMs using a common interface.

Use the TotalAgility CMIS integration capabilities to integrate with any third-party document management product that supports CMIS standards, for example, SharePoint. This enables you to use a common interface to configure multiple CMIS-compliant systems and to manage different document management products from within TotalAgility.

Also, for TotalAgility to work with a CMIS-compliant site across domains, you must configure SSL.

TotalAgility provides various CMIS integration nodes. Using these nodes, you can:

- Add (upload) a document to a CMIS-compliant site
- Update the properties of a document on a CMIS-compliant site
- Get a copy of a document/check out a document from a CMIS-compliant site
- Search for a document on a CMIS-compliant site
- Cancel the document check out from a CMIS-compliant site
- Check in a document to a CMIS-compliant site
- Create a folder on a CMIS-compliant site

See [Add a CMIS compliant site](#).

SharePoint

Integrate TotalAgility with SharePoint to increase the efficiency of business processes and improve team productivity. For example, you can upload a document to a document library, add an item to a custom list, or automatically start a job when a document is uploaded to a specific document library.

You can perform various actions in a SharePoint system directly from TotalAgility, and you can configure TotalAgility to respond to events that occur within SharePoint.

For TotalAgility to communicate with a SharePoint site, users must have the necessary access permissions. For example, a user with Read permission can only see the list of sites and events but cannot add, modify or delete anything.

The following table outlines the different access permissions required to add, modify, delete and view the integration site and events.

Access Type	Access Permission
Full Control	The user can add, modify and delete websites and events, and manage access permissions for other users.
Read/Write	The user can add, modify and delete websites and events, but cannot manage access permissions for other users.
Read only	The user can view the list of sites and events but cannot add, modify or delete anything.
No Access	The list of sites is not available to the user and the user cannot view a site or an event.

Note Modifications to user access rights take affect when the user logs in.

See also:

- [Create a Microsoft SharePoint integration site](#)
- [Configure TotalAgility actions resulting from SharePoint events](#)
- [Work with SharePoint web parts](#)

Dynamics CRM

Integration of TotalAgility with CRM helps end users to efficiently manage CRM activities, such as creating, retrieving and updating various business unit entities.

TotalAgility provides comprehensive out-of-the-box integration to the Microsoft Dynamics CRM. You can configure TotalAgility to respond to events that occur within Dynamics CRM.

Note Dynamics CRM is only available for TotalAgility on-premise; it not available for Designer running in On-premise multi-tenant and Azure environments.

To connect to a Microsoft Dynamics CRM and access one or more business units, provide the following information in TotalAgility:

- A name for the CRM System, such as Sales.

- The TotalAgility Web Service location (the server location) where the CRM is available, such as `<http://192.168.0.7:80/mscrmservices/2007>`.
- The name and unique CRM ID of the business unit.
- The CRM version to use (Pre 2011 to use CRM versions 3 and 4, or Post 2011 to use the version 5).
- User credentials to log into CRM.

See also:

- [Link TotalAgility to Microsoft Dynamics CRM](#)
- [Configure TotalAgility actions resulting from Microsoft Dynamics CRM events](#)

Dynamics AX

Microsoft Dynamics AX is an ERP solution that provides a purpose-built foundation across different industries.

TotalAgility provides out-of-the-box integration with Microsoft Dynamics AX. You can configure TotalAgility to respond to events that occur within Dynamics AX.

Note Dynamics AX is only available for TotalAgility on-premise; it not available for Designer running in On-premise multi-tenant and Azure environments.

Microsoft Dynamics AX includes the following capabilities:

- Financial Management
- Human Capital Management
- Manufacturing
- Supply Chain Management
- Procurement and Sourcing
- Project Management and Accounting
- Sales, Service, and Marketing
- Retail
- Business Intelligence (BI) and Reporting

See also:

- [Link TotalAgility to Microsoft Dynamics AX](#)
- [Configure the TotalAgility actions resulting from MS Dynamics AX events](#)

Exchange

TotalAgility provides out-of-the-box integration to Microsoft Exchange, enabling you to link your mail server to TotalAgility.

This allows you to handle tasks and jobs (such as take and complete a job) directly from your inbox, without having to access a separate application.

You can configure actions to trigger at the occurrence of a specific mail event. For example, automatically create a new job on a particular map as soon as an email arrives to your inbox.

Note Microsoft Exchange is only available for TotalAgility on-premise; it is not available for Designer running in On-premise multi-tenant and Azure environments.

See also:

- [Link TotalAgility to Microsoft Exchange](#)
- [Configure TotalAgility actions resulting from Microsoft Exchange events](#)

Microsoft Outlook

Microsoft Outlook is seamlessly integrated with TotalAgility, enabling you to directly view, complete, save and cancel TotalAgility tasks from Outlook.

Once Outlook is integrated with TotalAgility, a TotalAgility menu is displayed in the Outlook menu bar, allowing you to configure TotalAgility-related actions. For example, you can:

- Display TotalAgility tasks in the default Outlook Tasks folder or have a separate folder for TotalAgility Tasks.
- Refresh the TotalAgility task list in Outlook manually or automatically.

These options enhance usability and save you from having to switch between different applications.

This section describes the following:

- [Configure Microsoft Outlook settings for TotalAgility](#)
- [Configure the task display settings](#)
- [Take and complete the TotalAgility tasks from Outlook](#)

Microsoft Visio

Use the TotalAgility integration with Microsoft Visio to convert Microsoft Visio business process and flowchart drawings into TotalAgility importable XML files.

See the Technical Specifications document available on Kofax website for the supported versions of Microsoft Visio.

The integration works as follows:

- The TotalAgility Microsoft Visio add-on provides a one-way conversion process. Once you convert a Visio drawing into a TotalAgility XML file, you cannot convert the XML file back into a Visio drawing for editing.
- Once you convert a Visio drawing into a TotalAgility process map, you can edit the map in the TotalAgility Process Designer.
- If a Visio document contains multiple pages, TotalAgility imports each page and uses the page name as the name of the process map.

The TotalAgility Microsoft Visio add-on supports the Business Process and Flowchart diagrams.

See [Microsoft Visio drawings supported by TotalAgility](#).

This section describes the following:

- [Add the TotalAgility Microsoft Visio Add-On to Microsoft Visio](#)
- [Convert Microsoft Visio drawing to TotalAgility XML file](#)