Kofax TotalAgility
Lexmark MFP Starter Package Getting Started Guide
Version: 7.5.0

Date: 2018-06-12

KOFAX

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Preface

This guide explains how to use Kofax TotalAgility to import and process the Lexmark MFP Starter Package.

Introduction to Kofax TotalAgility

Kofax 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, Kapow, SignDoc and Customer Communications 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.

Related documentation

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

https://docshield.kofax.com/Portal/Products/KTA/750-4kcae04o43/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 Kofax 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.

Get help for Kofax products

Kofax regularly updates the Kofax Support site with the latest information about Kofax products.

To access some resources, you must have a valid Support Agreement with an authorized Kofax Reseller/Partner or with Kofax directly.

Use the tools that Kofax provides for researching and identifying issues. For example, use the Kofax Support site to search for answers about messages, keywords, and product issues. To access the Kofax Support page, go to www.kofax.com.

The Kofax Support page provides:

- Product information and release news

  Click a product family, select a product, and select a version number.

- Downloadable product documentation

  Click a product family, select a product, and click **Documentation**.

- Access to product knowledge bases

  Click **Knowledge Base**.

- Access to the Kofax Customer Portal (for eligible customers)

  Click **Account Management** and log in.

  To optimize your use of the portal, go to the Kofax Customer Portal login page and click the link to open the *Guide to the Kofax Support Portal*. This guide describes how to access the support site, what to do before contacting the support team, how to open a new case or view an open case, and what information to collect before opening a case.

- Access to support tools

  Click **Tools** and select the tool to use.

- Information about the support commitment for Kofax products

  Click **Support Details** and select **Kofax Support Commitment**.

Use these tools to find answers to questions that you have, to learn about new functionality, and to research possible solutions to current issues.

Lexmark MFP Starter Package overview

The Lexmark MFP Starter Package is a sample package with predefined components you can use to create forms and processes to scan documents on a Lexmark MFP and send them to TotalAgility. These components enable you to deploy and register a cSF app and display different screen sizes based on the size of the MFP's screen. For information about cSF clients and the supported screen sizes of your device, see the documentation provided with the Lexmark MFP and the *Kofax TotalAgility Administrator's Guide for Lexmark MFPs*.

The Lexmark MFP Starter Package includes the following components:
- Forms that appear on the MFP screen with options to log on (including single sign-on), scan documents, and display the document queue.
- Process maps to scan and send documents, add documents to the current job, and display scan results.
- Components from the Capture Starter Pack so that you can test them with the MFP. For information about these components, see the *Kofax TotalAgility Capture Starter Pack Getting Started Guide*.

When you are comfortable with the process of working with the Lexmark MFP Starter Package, you can customize it in a TotalAgility environment.

To use the Lexmark MFP Starter Package, do the following:
1. Import the Workspace package as shown in the *TotalAgility Installation Guide*.
2. Set up and configure the client app on Lexmark MFPs. See the *Kofax TotalAgility Lexmark MFP Administrator's Guide* for instructions.
3. Import the Lexmark MFP Starter Package in TotalAgility Designer. After importing, some features of the package may require additional configuration.
4. Print sample files for testing.

   These are located in the `Sample Processes\MFP Starter Pack\Sample Images` folder where TotalAgility is installed.

   Print these images at 600 dpi.
5. Scan the images at 200 dpi to ensure correct extraction.

Lexmark MFP Starter Package import

This chapter explains how to import the Lexmark MFP Starter Package. A list of imported files and the package components are included.

Lexmark MFP Starter Package installation folder

The Lexmark MFP Starter Package is installed in the Kofax TotalAgility installation directory at:

`Sample Processes\MFP Starter Pack.`

This folder includes the following items:

- MFP Starter Pack Package.zip
- `Sample Images`: This folder includes the following images:
  - Order 1.tif
  - Order 2.tif
  - Order 3.tif
  - Order 4.tif
  - Order 5.tif
  - Trispec 1.tif
  - Trispec 2.tif
  - Trispec 3.tif
  - Trispec 4.tif

Import the Lexmark MFP Starter Package

1. Start **TotalAgility Designer**.
2. On the Home page, click **Packages** > **Import Package**.
   The **Packages** page appears.
3. Next to the **Package** field, click **Browse**.
   The **Choose File to Upload** window appears.
4. Navigate to the Lexmark MFP Starter Package installation folder, select **MFP Starter Pack Package.zip** and click **Open**.
   The files in the package are imported and listed on the **Import Package** page.
5. Leave the import options at their default settings.
   If you want to overwrite device settings with those in the package, see Device settings import.

6. Click **Import**.

   A message appears to confirm that the import is successful. Note the following:

   - Warnings may appear indicating that components have already been imported. These messages are expected and can be ignored.
   - If any other errors or warnings appear, resolve them before you proceed.

7. Click **Close**.

Device settings import

When you import a package, you can override the settings for MFPs in Devices. At the Import Package page, set the following under Devices Import Options:

- Overwrite Existing Devices
- Overwrite Existing Device Profiles
- Overwrite Existing Device Settings

If an option is set to **Yes**, all device data is imported and overwritten. If set to **No**, only the devices that are not on the system are imported and existing ones are left unchanged.

Device settings are defined in the package settings under Deployment Configuration. Click **Configure > Device Settings**. You can select which settings are overridden. See the TotalAgility Designer help for more information.

Chapter 3

Lexmark MFP Starter Package components

This section describes the predefined contents of the package included when you import the Lexmark MFP Starter Package into TotalAgility.
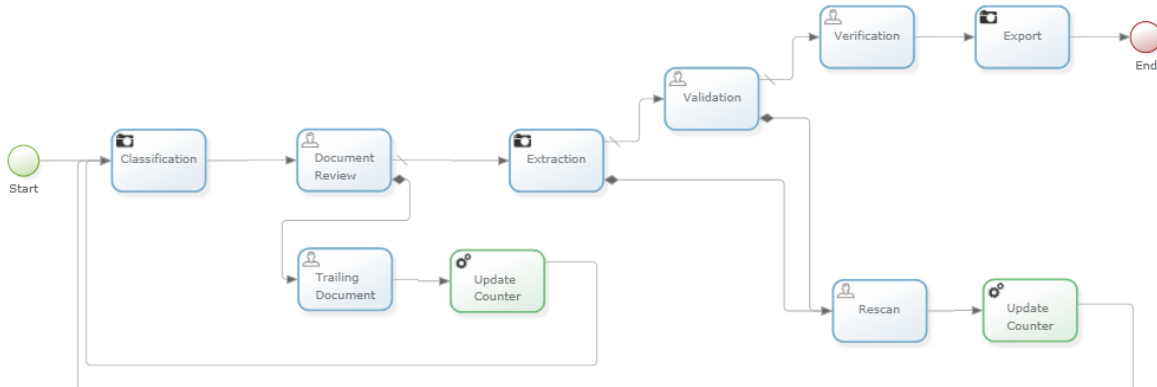
Category

Components used by Lexmark MFP Starter Package are added to the MFP Starter Pack category.

Process

The diagram represents the workflow of the Lexmark MFP Starter Package process. To open this process, do the following:

1. On the TotalAgility Home page, click **Process Designer**.

2. In the Explorer panel, click **Processes** > **All**.

3. In the Category Filter field, select **MFP Starter Pack**.

4. In the Explorer panel, click **MFP Starter Pack**.

This process includes the following activities:

• Classification

- Document Review
- Extraction
- Trailing Document
- Validation
- Rescan
- Verification
- Export

The activities are split into those that run on the MFP and those performed in TotalAgility Workspace.

When documents are scanned on the MFP, they are processed with the Classification activity, which has been trained with the sample images in the `Sample Processes\MFP Starter Pack\Sample Images` folder.

After Classification, the job is sent to the Document Review activity that you run in TotalAgility Workspace. If you reject the job, or if the document has fewer than three documents, it is sent to the Trailing Document activity on the MFP where the user adds documents to the job. After the documents are added, the job goes back to Classification and Document Review.

If you accept the job in Document Review, it goes to Extraction and then Validation, which you run in TotalAgility Workspace. If you reject the job in Validation, it goes to the Rescan activity on the MFP where the user can rescan the document. If you accept the job in Validation, it goes to Verification, which you perform in TotalAgility Workspace, and Export, which is described in Export.

You can configure the branching rules. See the TotalAgility Help for instructions.

Scan/VRS profile

The Lexmark MFP Starter Package is configured to use the Capture Starter Pack profile. You can change this profile, modify the scan activity to use a different profile, or change the profile's settings on the MFP by clicking the Scan Settings button.

Forms

The Lexmark MFP Starter Package includes the following forms.

Name	Description
MFP Starter Pack_DeviceScan	Device Create New Job form an MFP or mobile device.
MFP Starter Pack_Document Review_DocumentReview	Scan Create New Job form for an import connector and the Capture Client.
MFP Starter Pack_MFPScan	Scan form with a single input fields for the job serial number. Use the button on the device to scan.
MFP Starter Pack_Rescan_Scan	Form that appears when you need to rescan a document. Includes two input fields for the job serial number and a destination folder. Use the buttons to scan pages or cancel the job.

Name	Description
MFP Starter Pack_Trailing Document_Scan	Form that enables you to add trailing documents to an existing job. Includes two input fields for the job serial number and a destination folder. Use the buttons to scan pages or cancel the job.
MFP Starter Pack_Validation_Validation	Take Activity Form for Validation.
MFP Starter Pack_Verification_Verification	Take Activity Form for Verification.
MFPFederatedLogon	Form used when logging on with federated security.
MFPForgotPassword	Form used to reset a forgotten password. The user is prompted to enter the email address associated with the account to receive a link to reset the password.
MFPLanding	Form that should be registered in the Lexmark Registration Client. Displays the message "Loading" and then redirects to the MFPLogon form to log on or to MFPWorkQueue when users are authenticated with single sign-on.
MFPLogon	Form to log on to the application.
MFPWorkQueue	Form that has two tabs for the work queue and shortcuts. You can view jobs in the existing queue or select a shortcut to create a new job.

After you import the package, these forms are available in TotalAgility for customization.

To open a form, on the TotalAgility Home page, click **Form Designer**, in the Explorer panel, click **Forms**, and then click the form to open.

These generated forms are dynamic, and therefore no fields are displayed at design time.

The scan forms have the following options. See the TotalAgility Designer help for instructions.

- Scan forms can display a preview of the image. You can enable or disable this preview in the corresponding form's Scan action in TotalAgility Designer.
- Use the Upload and Progress Job option to enable another job to start before the current job finished uploading images to the server.
- For the Scan action, you can control what happens after a failed scan by setting options for the ScanFailed event. For a scan initiated with MFP Starter Pack_MFPScan, you can terminate the job and redirect back to the start of the work queue. For MFP Starter Pack_Trailing Document_Scan and MFP Starter Pack_Rescan_Scan, a failed scan can be cancelled and redirected back to the start of the work queue.

Export

The Lexmark MFP Starter Package process in the imported package contains an Export activity. When you use this process to create jobs, jobs are not executed unless you install the appropriate Kofax Export Connector for the destinations you want to use. Install the connector and use the Export Connector - Setup screen to configure the connector for use with the Lexmark MFP Starter Package process.

> **Note** The export activity is not supported in an Azure environment. When you create a job on a process that has an export activity, the job suspends with error.

Site

Two sites are provided with the Lexmark MFP Starter Package:

- mfpmediumscreen: For medium-sized MFP panels. Displays 8-point text.
- mfplargescreen: For large-sized MFP panels. Displays 11-point text.

You can customize the sites and themes as shown in the TotalAgility Designer help.

When you provide the URL for the client app in the Lexmark Registration Client, include the site as follows.

```
https://<server>/TotalAgility/Forms/<site>/MFPLanding.form
```

Where <server> is the name of the TotalAgility server and <site> is the name of the site for the selected screen size. If you omit the site from the URL, the default theme is used.

When you connect to this URL, the following occurs:

- The site is selected as configured in the Lexmark Configuration Client. See the *Kofax TotalAgility Administrator's Guide for Lexmark MFPs* for instructions.
- If you have logged on to the MFP successfully using single sign-on, the MFPWorkQueue form opens. If you need to log on, the MFPLogon form opens.