

Kofax TotalAgility

Capture Starter Pack Getting Started 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 'K' and 'F' are particularly prominent due to their size and the sharp angles of their strokes.

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Preface

This guide explains how to use Kofax TotalAgility to import and process the Capture Starter Pack.

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, RPA, Kofax SignDoc and Kofax Communications Manager products respectively.

On-Premise Multi-Tenant

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 product documentation set for Kofax TotalAgility 7.8.0 is available at the following location.

<https://docshield.kofax.com/Portal/Products/KTA/7.8.0-dpm5ap0jk8/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-Tenant 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 Features Guide*: Provides an overview of the TotalAgility features.
- *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.

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 commitment, 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

Capture Starter Pack overview

The Capture Starter Pack is a sample package with predefined components you can use to create and process jobs in TotalAgility.

The Capture Starter Pack includes the following components:

- Process map with common capture tasks, such as ingestion, image processing, classification, document review, extraction, validation, verification, and export.
- Process map with error handling built into the process.
- A companion Transformation Designer project with documents already trained.
- Two document types with index fields. These document type use sample documents.
- Classification and extraction group.
- Extraction group includes all field types, including tables.
- Ingestion points from Thin Client, Kofax Import Connector, MFP, and mobile sources.

These components relate to each other in the following way:

- The extraction groups describe fields.
- The extraction groups are associated with classification groups, which describe documents.
- The classification group is linked to a process that consists of activities which describe the events of the business workflow.
- The process and its activities are used to create forms that form the base content to be rendered on displays.

Use the Capture Starter Pack to create jobs, such as scanning documents from an MFP or taking pictures of documents from a supported mobile device.

To use the Capture Starter Pack, you have to import it. After importing, some features of the package may require additional [configuration](#).

Once you are comfortable with the process of working with the Capture Starter Pack, you can import images from applications, such as Kofax Capture or Kofax Mobile Capture to process or customize in a TotalAgility environment.

Chapter 2

Capture Starter Pack import

This chapter explains how to import the Capture Starter Pack.

Capture Starter Pack installation folder

The Capture Starter Pack is installed alongside Kofax TotalAgility in your installation directory at:

```
\\TotalAgilityInstall\Sample Processes\Capture Starter Pack
```

This pack includes the following items:

- **Sample Images:** This folder includes the images for the English language.
- **Sample Images - Japanese:** This folder includes the images for the Japanese language
- **Capture Starter Pack Package - Japanese:** The zip file for the Japanese language.
- **Capture Starter Pack Package:** The zip file for the English language.

Import the Capture Starter Pack

1. Launch **TotalAgility Designer**.
2. Navigate to **Import**.
The **Import** page appears.
3. **Browse** to the **Capture Starter Pack Package.zip** or drag the ZIP file from your machine to the **File to import** box.
The files in the package are listed on the **Import** page.
4. Click **Import**.
A message appears to confirm that the import is successful.

Note When importing, if any errors or warnings occur, resolve them before you proceed.

Chapter 3

Capture Starter Pack components

This section describes the predefined contents of the package available on importing the Capture Starter Pack into TotalAgility. This package includes:

- Capture Starter Pack category
- Capture Starter Pack folder type
- Capture Starter Pack extraction group
- Capture Starter Pack Classification group
- Capture Starter Pack process
- Capture Starter Pack Scan/VRS profile
- Capture Starter Pack forms
- An Export activity within the process
- Capture Starter Pack site
- Capture Starter Pack navigation

Category

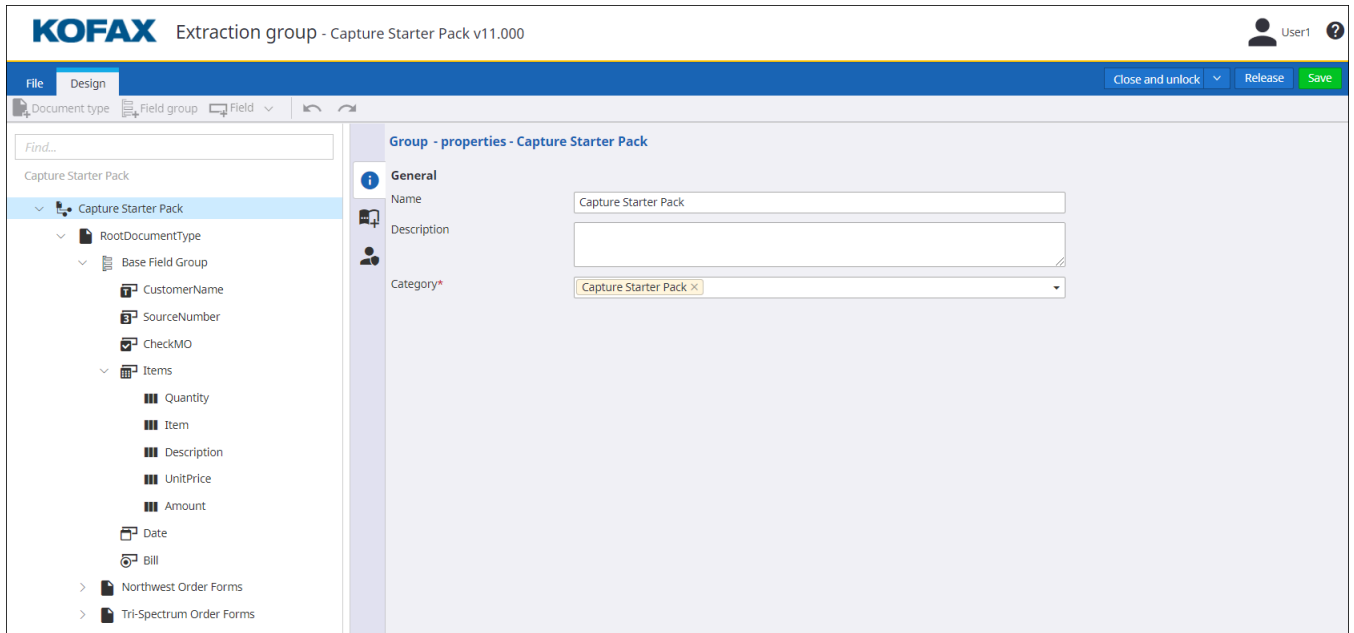
To open the Capture Starter Pack category after importing, navigate to **System** and click **Categories**. The Categories page displays **Capture Starter Pack**. The Capture Starter Pack category is used to hold other components, such as processes, forms, classification groups, and extraction groups.

Folder type

To open the Capture Starter Pack folder type, navigate to **Capture** and click **Folders**. In the Folders page, on the **Category** list, select **Capture Starter Pack**. The Capture Starter Pack folder type is displayed. Click the folder type to open. The Capture Starter Pack folder type opens in a new browser tab. This folder type includes the Text type Process field.

Extraction group

To open the Capture Starter Pack extraction group, navigate to **Capture**, and click **Extraction groups**. In the Extraction groups page, on the **Category** list, select **Capture Starter Pack**. The Capture Starter Pack extraction group is displayed in the list. Click the Capture Starter Pack. The extraction group opens in a new browser tab. Expand the Order Forms document type to view the other document types. You can also search for the required document type name.



The Capture Starter Pack extraction group contains the following document types:

- **Order Forms**
- **Northwest**
- **Tri-Spectrum**

The **Order Forms** document type includes the **Order Fields** field group, which includes the following fields.

Field	Type	OCR
CustomerName	Text	RS_MachineAlphanum (RecoStar 5.0)
SourceNumber	Number	Bar Code Locator
CheckMoneyOrder	Boolean	OMR_Manual (OMR)
LineItems	Table	
LineItem - Quantity	Number	FR_HandNum
LineItem - Article Code	Text	FR_HandNum
LineItems - Description	Text	FR_HandAlphanum
LineItems - Unit Price	Number	FR_HandNum
LineItems - Total Price	Number	FR_HandNum
OrderDate	Date	RS_HanNnum (RecoStar 5.0)
CardType	Choice (Possible values: Visa, MasterCard, American Express)	Default OMR for each option.

The Verification configuration determines which fields appear in the Verification activity. The CustomerName, SourceNumber and CheckMO fields require configuration.

Northwest and Tri-Spectrum: These document types extend Order Fields field group so that they both have all the **Order Fields** field group's fields. They are trained using the Transformation Designer. The Extraction activity uses the training result to recognize and populate document fields automatically.

Classification group

To open the Capture Starter Pack classification group, navigate to **Capture**, and click **Classification groups**. In the Classification groups page, on the **Category** list, select **Capture Starter Pack**. The Capture Starter Pack classification group is displayed. Click the classification group to open.

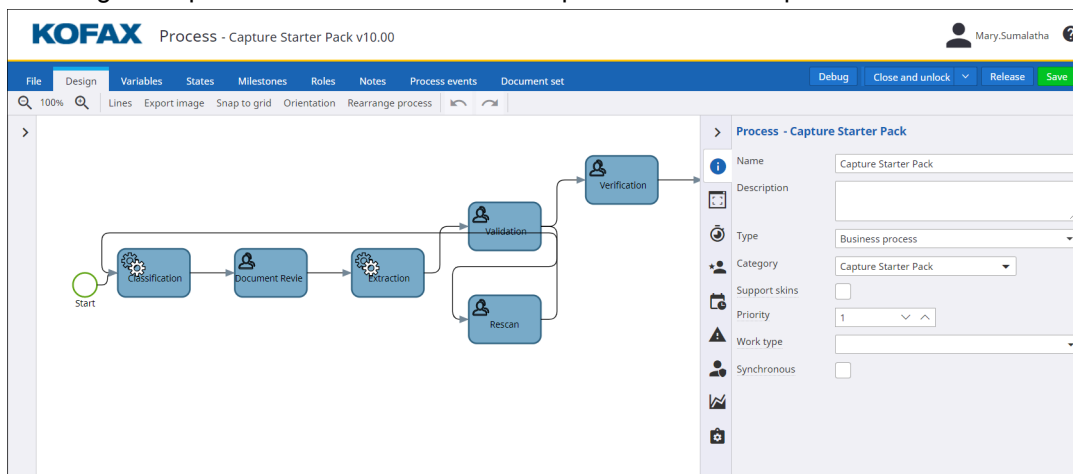
The Capture Starter Pack Classification group uses the Capture Starter Pack Extraction group.

Both document types (Northwest Order Forms and Tri-Spectrum Order Forms) in the Capture Starter Pack extraction group are already trained by Transformation Designer. The Classification activity uses the training results to classify documents automatically.

Process

To open the Capture Starter Pack process, Navigate to **Workflow** and click **Business processes**. In the Business processes page, on the **Category** list, select **Capture Starter Pack**. Click the Capture Starter Pack business process. The process opens in a new browser tab.

The diagram represents the workflow of the Capture Starter Pack process.



This process includes the following capture activities.

- Classification
- Document Review
- Extraction

- Validation
- Verification
- Export
- Rescan

The Validation and Extraction activities in this process use branching rules.

If the activity is completed with rejected documents or pages, the input folder is sent to the Rescan node; otherwise, it is routed to the next node in the normal process flow. The Rescan node is a Scan activity configured for rescan purposes. Rescan is equivalent to Quality control in Kofax Capture.

See the *TotalAgility help* for configuring a branching rule and scan activity.

Scan/VRS profile

To open the Capture Starter Pack Scan/VRS profile, navigate to **Capture > Scan/VRS profile** and click **Capture Starter Pack**.

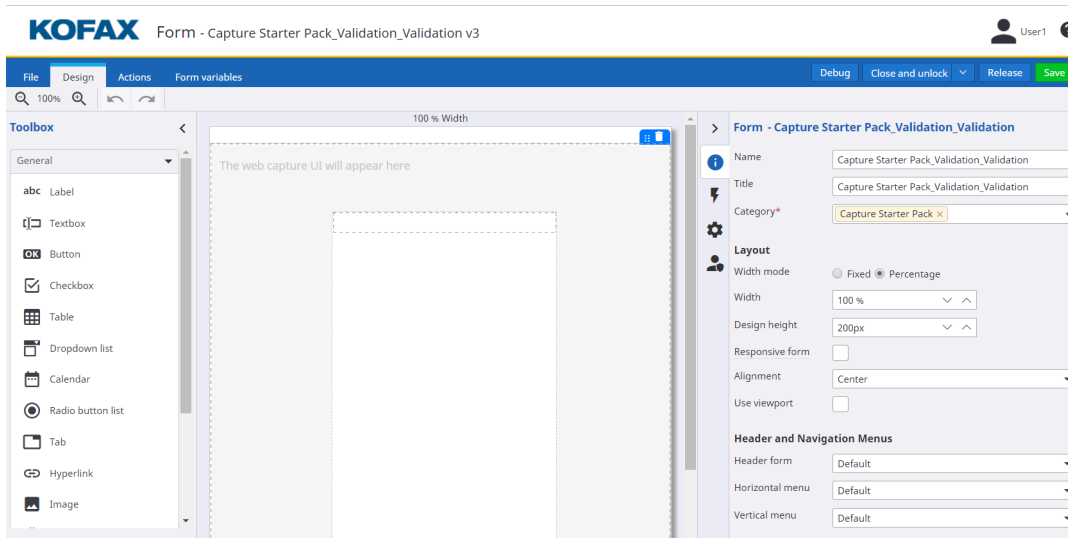
The Capture Starter Pack process, Device create new job and Scan create new job forms use this profile. After scanning, images are processed by VRS.

Forms

To open a form, navigate to **User interface** and click **Forms**. In the Forms page, on the **Category** list, select **Capture Starter Pack**. The Capture Starter Pack includes the following forms.

Name	Type
Capture Starter Pack_Document Review	Document review
Capture Starter Pack_Rescan	Scan activity (for Kofax Import Connector and Capture Client)
Capture Starter Pack_Scan	Scan create new job (for Kofax Import Connector and Capture Client)
Capture Starter Pack_Validation	Validation
Capture Starter Pack_Verification	Verification
ManualLogon	Logon
Capture Starter Pack_DeviceScan	Device create new job (for MFP and Mobile Devices)

After you import the package, these forms are available in TotalAgility for customization. These generated forms are dynamic, and therefore no fields are displayed at design time.



The Capture Starter Pack_DeviceScan form, which is generated by the TotalAgility user, is used in MFPs and mobile devices. In this form, the fields are displayed both at the design time and runtime. Table fields are not supported.

Due to the asynchronous nature of device scanning, a job is actually created prior to any images being scanned. To prevent a job from processing when the images are not received, a [SCANNED] event precondition is added to the first activity in the process, that is the Classification activity.

As a result, any other file ingestion point must raise the same [SCANNED] event to ensure the process progresses beyond the Classification activity. For example, add a custom form action to the Scan Create New Job form's "OnCreateNewJob" event to raise the [SCANNED] event.

If you do not ingest through a Device Create New Job form, remove the [SCANNED] event precondition, so that the [SCANNED] event is not raised in other ingestion channels.

Site

To open a site, navigate to **User interface** and click **Sites**. In the Sites page, on the **Category** list, select **Capture Starter Pack**. Click the Capture Starter Pack site to open.

The Capture Starter Pack site includes the following properties:

- **Category:** Capture Starter Pack
- **Name:** CaptureStarterPack
- **Languages:** Where you select the Japanese language.
Click **Add** to select the language.

- **Desktop settings, Tablet settings and Phone settings**
 - **Theme:** TotalAgility Workspace
 - **Header form:** WorkspaceHeader
 - **Horizontal navigation:** Capture Starter Pack
 - **Default form:** LogonForm

Use the following URL to access the CaptureStarterPack site.

```
http://<servername>/totalagility/forms/capturestarterpack/
```

The browser automatically navigates to:

```
http://<server name>/totalagility/forms/capturestarterpack/LogonForm.form
```

Logon form

The default TotalAgility Workspace uses Windows authentication. You can use a manual logon form to give different users the ability to log on.

The Logon form is set as a default form for the Capture Starter Pack site. You can set any form as the default form for the site.

Navigation

To open the navigation, navigate to **User interface** and click **Navigations**. In the Navigations page, on the Category list, select **Capture Starter Pack**. Click the **Capture Starter Pack** navigation to open.

By default, the navigation menu displays the following properties:

- Name: Capture Starter Pack
- Category: Capture Starter Pack
- Width: 150
- Height: 30

The Capture Starter Pack navigation includes the following menu items: Scan, Work Queue and Jobs. Under Menu Items, expand Capture Starter Pack and select the menu item.

Scan: It includes the following properties:

- Type: Menu Item
- Menu Item Name: Scan
- Target: Capture Starter Pack_Scan

Work Queue: It includes the following properties:

- Type: Menu Item
- Menu Item Name: Work Queue
- Target: GeneralWorkQueue.form

Jobs: Expand the Jobs menu to view the Create and Find menu items. They include the following properties:

Menu Item	Properties
Create	
	Type: Menu item
	Menu Item Name: Create
	Target: CreateNewJob.form
	Window: Same window
Find	
	Type: Menu item
	Menu Item Name: Find
	Target: findjobs.form
	Window: Same window

Access forms

Access the Kofax TotalAgility Workspace, using the following URL:

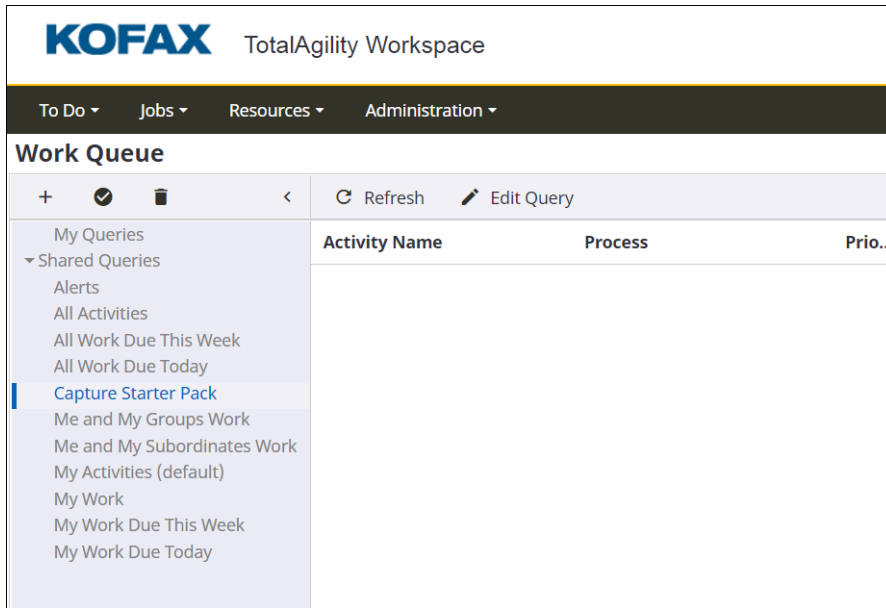
`http://<hostname>/totalagility/forms/capturestarterpack/`

Use the Capture Starter Pack Workspace menu to access the Capture Starter Pack Scan and General Work Queue forms to start jobs in Thin Client.

Note The Capture Starter Pack Workspace menu is not available for Kofax Import Connector, Kofax Mobile Capture, or MFPs.

View the Capture Starter Pack activities

To view Capture Starter Pack activities, on the Work Queue page, under Shared Queries, select **Capture Starter Pack**.



Export

The Capture Starter Pack 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 Kofax Export Connector for Text.

Install the connector and use the Export Connector - Setup screen to configure the connector for use with the Capture Starter Pack process. See [Configure Kofax Export Connector settings](#).

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.

Process documents

Processing a document involves the following procedure.

1. Scan a document: Navigate to the Capture Starter Pack_Scan form.

Note Use this form for the Web file import. When you access the form for the first time on a fresh Kofax TotalAgility installation, you are prompted to install the file import service. Select the file import as a scan source for the next step.

KOFAX TotalAgility Workspace

To Do ▾ Jobs ▾ Resources ▾ Administration ▾

File Import Profile: Capture Starter F

Page 1 of 4

Navigator Document Type: Select a document type...
 Capture Starter Pack (1)
 1: (4)

Fields Document Folder Process
 Process Capture Starter Pack

Current Error

Thumbnails Document: (4)

Uniform Residential Loan Application

This application is designed to be completed by the applicant(s) with the Lender's assistance. Applicants should complete this form as "Borrower" or "Co-Borrower" as applicable. Co-Borrower information must also be provided (and the appropriate box checked) when the income or assets of a person other than the Borrower (including the Borrower's spouse) will be used as a basis for loan qualification or the income or assets of the Borrower's spouse or other person who has community property rights pursuant to state law will not be used as a basis for loan qualification. or his/her liability must be considered because the spouse or other person has community property rights pursuant to applicable law and Borrower resides in a community property state. The security property is located in a community property state, or the Borrower is relying if this is an application for joint credit, Borrower and Co-Borrower each agree that we intend to apply for joint credit (page below).

Borrower Co-Borrower

I. TYPE OF MORTGAGE AND TERMS OF LOAN

Mortgage VA Conventional Other (explain) Agency Case Number Lender Case Number
 Applied for FHA USDA/Rural Housing Service 1309002964

Amount \$ 119,000.00 Interest Rate 4.750 % No. of Months 360 Amortization Fixed Rate Other (explain) Type GPM ARM (type)

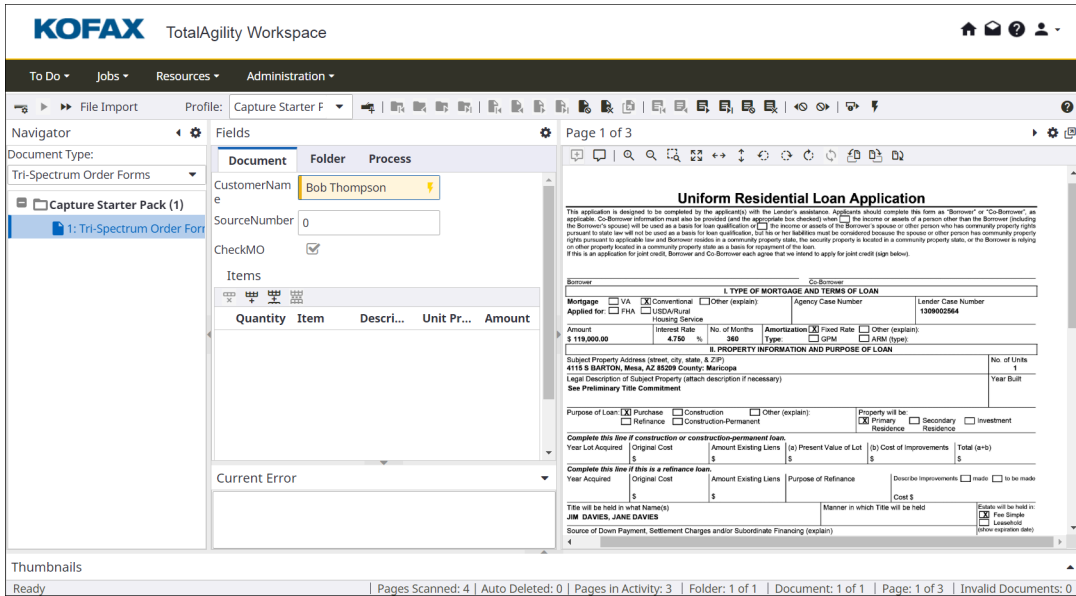
II. PROPERTY INFORMATION AND PURPOSE OF LOAN

Subject Property Address (street, city, state, & ZIP) No. of Units
 4115 S BARTON, Mesa, AZ 85209 County: Maricopa 1
 Legal Description of Subject Property (attach description if necessary) Year Built
 See Preliminary Title Commitment

Ready | Pages Scanned: 4 | Auto Deleted: 0 | Pages In Activity: 4 | Folder: 1 of 1 | Document: 1 of 1 | Page: 1 of 4 | Invalid Documents: 0

2. The images in the document are automatically classified using the Classification activity.
3. Manually review the classification results using the Review activity. If any document, folder, or field in the activity is invalid, correct it.
4. Documents and folder fields are automatically recognized using the Extraction activity.
5. Manually validate the field values using the Validation activity.

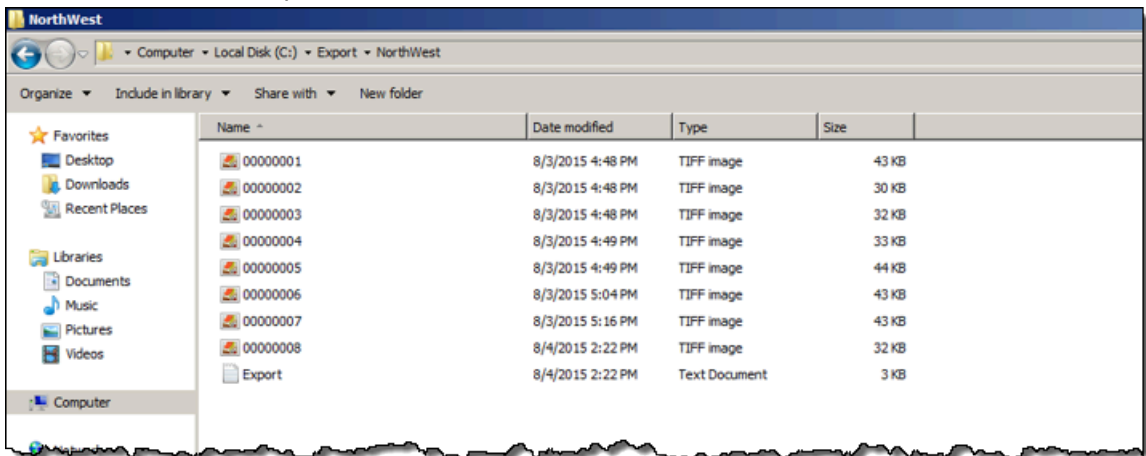
- Verify the document data before it is exported using the Verification activity. In the sample, only three fields are configured for verification: CustomerName, SourceNumber and CheckMO.



- Using the Export activity, documents are exported to the following folder:

- c:\Export\NorthWest
- c:\Export\Tri-spectrum

Each folder includes Export.txt, which lists the document and folder fields.



Customize the components

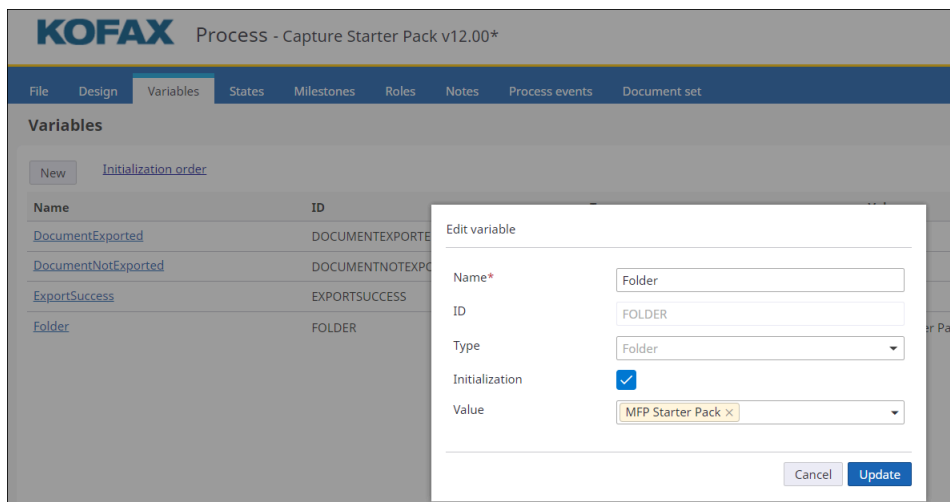
You can customize the Capture Starter Pack process by changing the classification group, extraction group and folder types in the Capture Starter Package, as needed.

For information on folder type, extraction group and classification group, see the *Kofax TotalAgility help*.

Change the folder type

A folder is assigned to the process variables and initialized when a new job is created. To use a different folder type, replace the folder variable with a different folder.

1. Open the Capture Starter Pack process.
2. On the modeling bar, click **Variables** and then click the **Folder** variable.
The **Edit variable** dialog box is displayed.
3. On the **Value** list, delete the Capture Starter Pack variable and select another folder variable.



4. Click **Update**

Change the classification group

1. Navigate to Workflow and open the Capture Starter Pack process.
2. In the properties panel of the process, click the **Capture** tab.
The Capture Starter Pack group appears by default on the **Classification group** list.
3. On the **Classification Group** list, delete the default Capture Starter Pack and select a different classification group.
4. Click **Save**.

Change the extraction group

An extraction group is linked to a classification group, which in turn is associated with a process. You can change the extraction group associated with the Capture Starter Pack process through the classification group.

1. Navigate to **Capture** and click **Classification groups**.
The **Classification Group** page appears.
2. On the **Category** list, click **Capture Starter Pack**.

3. Click the Capture Starter Pack classification group.
The **Edit classification group** dialog box is displayed.
4. In the **Extraction groups** box, delete the Capture Starter Pack group that appears by default, and add a different extraction group.
5. Click **Save**.

Chapter 4

Capture Starter Pack configuration

When you import the Capture Starter Pack, the default settings enable you to process the included documents. If you wish to process your own documents, some changes to the configuration may be required.

See also:

- [Configure ingestion sources](#)
- [Configure the Kofax Export Connector settings](#)

Configure ingestion sources

Ingestion sources include input sources, such as Thin Client, MFP, Mobile, and Kofax Import Connector. Thin Client uses the forms embedded in the package; other ingestion sources require manual configuration after you import the package. For manual configuration details, see:


- [Configure MFP settings](#)
- [Configure Mobile settings](#)
- [Configure Kofax Import Connector settings](#)

Configure the MFP settings

You must download MFP client software to configure TotalAgility for use with MFPs.

Download MFP Client software

Follow the instructions for downloading the MFP client software, such as MFP Emulator.

1. Launch TotalAgility Designer and navigate to **System > System Settings > Capture > Devices**.
The **Devices** page appears.
2. Click **Download**.
3. To download MFP Client Software, on the **Manufacturer** list, select the manufacturer that corresponds to your MFP type, such as **MFP Emulator**.
4. Click .
A .zip file containing installation instructions in the PDF format is downloaded.
5. Run and configure the MFP Emulator as described in the guide.
The MFP Emulator is installed.

MFP Emulator

1. Start the MFP Emulator.
2. On the **Main Menu** for the MFP Emulator, select the Capture Starter Pack_DeviceScan form. The Index Fields for the Capture Starter Pack_Device Scan dialog box appears.
3. Navigate to **Settings > Devices > Device Profiles** and edit the Default Profile.
4. On the **Associated Forms** tab, associate the Device form for the process into the **Associated** column.
5. Click **Save**.

Configure the Mobile settings

Kofax Mobile Capture is available for Android and iOS devices. After installing Kofax Mobile Capture on a mobile device, you can configure it for use with the Capture Starter Pack in TotalAgility.

Note The jobs initiated from the mobile devices do not perform image processing or separation on the server. The Imaging volume will be decremented for all pages originating from a mobile device using a Device Create New Job form.

1. Log on to Kofax Mobile Capture.
2. On the **Main Menu**, select Capture Starter Pack_DeviceScan. The fields associated with your form selection appear on the Field Details screen.

Configure the Kofax Import Connector connection settings

You can use the Kofax Import Connector to import documents into TotalAgility.

Note You can also use Email as an import source to import documents from an inbox.

1. Install and configure the Kofax Import Connector.
2. On the **Main Menu**, select **Capture Starter Pack_DeviceScan**.
3. Launch TotalAgility Designer, and navigate to **Integration > Import settings**. The **Import settings** page appears.
4. Click **New**. The **New import connection** dialog box is displayed.
5. Enter a **Name** for the import connection as Capture Starter Pack.
6. By default, the import connection is **Active**.
7. Enter the **Message connector URL** for the new import connection.
8. Click **+** for **Import sources** and add the File import source.
9. Configure the File Import source.
10. Save the changes.

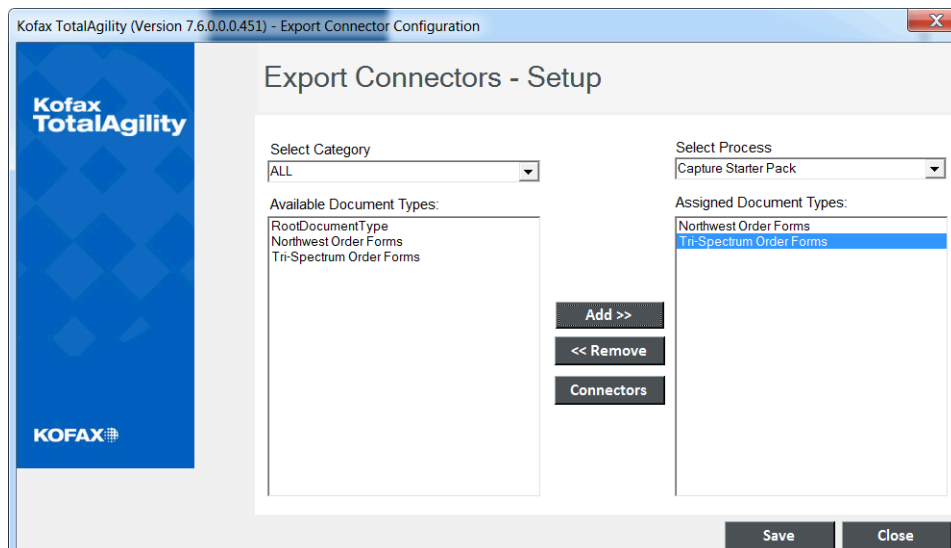
Configure the Kofax Export Connector settings

For jobs created using the Capture Starter Pack process to execute, you must install the Kofax Export Connector for Text 1.0 manually and then configure the connector with the Capture Starter Pack process. Refer to the [Kofax Export Connector help](#).

You can download the Kofax Export Connector for Text 1.0 from the KofaxTotalAgility ZIP available on a per language basis, such as Kofax TotalAgility7.8.0_EN.zip and Kofax TotalAgility7.8.0_DE.zip from the Kofax Fulfillment Site.

Once the Export Connector is installed, you can access it through the Start menu.

1. On the **Start** menu, click **Kofax TotalAgility > Kofax Export Connector**.
2. In the **Export Connector Configuration** screen, click **Setup**.
3. In the **Export Connectors - Setup** screen, on the **Select Category** list, select **Capture Starter Pack**.



4. On the **Select Process** list, select **Capture Starter Pack**.
The document types from the selected process appear in the **Available Document Types** box.
5. From the **Available Document Types**, select Tri-Spectrum and NorthWest and click **Add**.
The selected document types appears in the **Assigned Document Types** box.
6. From the **Assigned Document Types** box, select the document type for which to assign the connector and click **Connectors**.
The Export Connectors - <Document type name> window appears.
7. From the **Available Export Connectors** box, select the connectors to assign to the document type and click **Add**.
The Kofax Export Connector for <Connector Name> Setup window appears with a predefined user interface. This step assigns the selected export connector to the document type and adds the selected connector to the **Assigned Export Connectors** box.

8. Use ↑ and ↓ to change the sequence of export connectors.
The export connectors are executed in the sequence specified.
9. Map the Document Index Fields to document fields of the document and Kofax Capture Values to system fields of the document.
10. Configure other details, as needed.

Note If you use an Export activity in your process, at runtime, documents are converted into images and exported to a folder in the format specified.

11. Click **Save**.

Exception handling

The system raises exceptions within running a capture process. For example, an exception is raised if there is an error when processing the documents or pages using a capture activity.

You can handle an exception by routing the documents to an alternate exceptional path with activities that can fix the problem and then restart the job from the beginning. For example, a scanning activity that rescans the image if there is an error in the image. All the capture activities support alternative execution paths. The path is chosen at runtime according to the branching rules defined for the activity at design time.

When rescanning, the scan activity automatically navigates to the next rejected document or page and the activity is completed only when there are no rejected documents or pages.

When processing the automatic capture activities, the system does the following:

- Skips any failed document or page and completes processing of all non-error documents and pages.
- Rejects the failed document or page and displays the rejection reason.
- Skips any document or page if it has already been processed before, and only processes new documents and pages.

A capture process has input variable of type Folder or Document. Use the HasRejections and RejectedByFailure properties in branching rules for the activity to send the batch through exception path (branch) when the batch contains rejections.

Example: Branching rules

Branching rules *

Default path *

Use exclusive OR (XOR)

DocReview *Right-click on rule editor to select item*

Verification