Kofax TotalAgility

MFP Starter Pack Getting Started Guide
Version: 7.8.0

Date: 2020-07-12

KOFAX

Table of Contents

Preface

This guide explains how to use Kofax TotalAgility to import and process the MFP 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 full documentation set for Kofax TotalAgility is available at the following.

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 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.

MFP Starter Pack overview

The MFP Starter Pack 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 MFP Starter Pack 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 MFP Starter Pack, you can customize it in a TotalAgility environment.

To use the MFP Starter Pack, do the following:

1. Make sure that the Workspace package has been installed with TotalAgility Designer.

   The Workspace package is located in the TotalAgility folder.

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 MFP Starter Pack in TotalAgility Designer. After importing, some features of the package may require additional configuration.

4. Print sample files for testing. The folders are located where TotalAgility is installed.

   - For MFP Starter Pack Package.zip, use the files in `Sample Processes\MFP Starter Pack \Sample Images`.
   - For MFP Starter Pack Package - Japanese.zip, use the files in `Sample Processes\MFP Starter Pack\Sample Images - Japanese`.

   Print these images at 600 dpi.

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

Chapter 2

MFP Starter Pack import

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

MFP Starter Pack installation folder

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

`\\TotalAgilityInstall\Sample Processes\MFP Starter Pack`.

This folder includes the following items:
- MFP Starter Pack Package.zip
- MFP Starter Pack Package - Japanese.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
- `Sample Images - Japanese`: This folder includes the following images, which are used with the MFP Starter Pack Package - Japanese package:
  - 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 MFP Starter Pack

1. Start **TotalAgility Designer**.
2. On the main menu, click **Import**.
   The **Import** page appears.
3. For **File to import**, click **Browse**.
   The **Choose File to Upload** window appears.
4. Navigate to the MFP Starter Pack folder, select **MFP Starter Pack Package.zip** or **MFP Starter Pack Package - Japanese.zip** and click **Open**.
   The files in the package are imported and listed on the **Import** page.
5. Leave the import options at their default settings.

   If you want to overwrite device settings with those in the package, under **Overwrite options**, select **Devices**, **Device profiles**, and **Device settings**.

   All device data is imported and overwritten. If this option is clear, only the devices that are not on the system are imported and existing ones are left unchanged.

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

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 **OK** and then click **OK** again.

Chapter 3

MFP Starter Pack components

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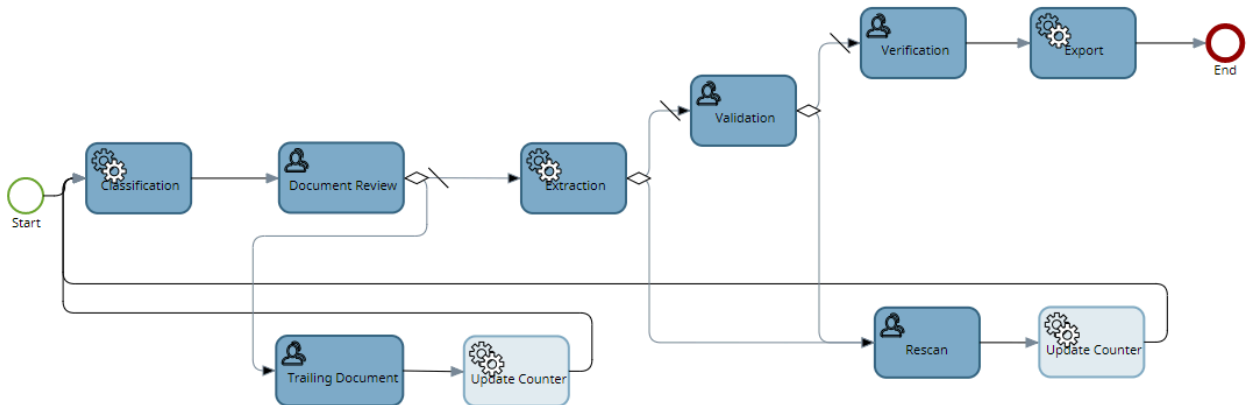
Category

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

Process

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

1. In the TotalAgility Designer, select **Workflow** > **Business processes**.

2. On the category list, select **MFP Starter Pack**.

3. On the list of business processes, 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.

Classification

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` or `Sample Processes\MFP Starter Pack\Sample Images - Japanese` folder.

Document review

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 which you run in TotalAgility Workspace.

Extraction

You can reject or accept jobs in extraction:

- Reject the job, and it goes to Rescan activity on the MFP where the user can rescan the document.
- Accept the job, and it goes to Validation, which you perform in TotalAgility Workspace.

Validation

You can reject or accept jobs in validation:

- Reject the job, and it goes to Rescan activity on the MFP where the user can rescan the document.
- Accept the job, and it goes to Verification, which you perform in TotalAgility Workspace.

Verification

After verification is successful, the export is performed.

Export

You can configure branching rules. For more information, see the Export section of this guide and the TotalAgility help.

Forms

The MFP Starter Pack 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.

Name	Description
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.
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	Activity form for Validation.
MFP Starter Pack_Verification_Verification	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, do the following:

1. In the TotalAgility Designer, select **User interface** > **Forms**.
2. On the list of forms, click the form to open.
   The form opens in a new browser tab.

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 MFP 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 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 MFP Starter Pack 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

The following sites are provided with the MFP Starter Pack. The sites accommodate different sizes of MFP panels, and English- and Japanese-language versions of each size are provided.

Description	English site	Japanese site
For medium-sized MFP panels. Displays 8-point text.	MFPMediumScreen	MFP 中型画面
For large-sized MFP panels. Displays 11-point text.	MFPLargeScreen	MFP 大画面

Note Spaces in the site name are escaped automatically when registering with the Lexmark Registration tool.

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.

- English site:

  ```
  https://<server>/TotalAgility/Forms/<site>/MFPLanding.form?
  FormTargetDevice=Tablet
  ```

- Japanese site:

  ```
  https://<server>/TotalAgility/Forms/<site>/MFP ランディング.form?
  FormTargetDevice=Tablet
  ```

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. For example, if you are using the medium-size panel for the Japanese site, the URL is as follows:

```
https://<server>/TotalAgility/Forms/MFP 中型画面/MFP ランディング.form?
FormTargetDevice=Tablet
```

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.