

Kofax TotalAgility MFP Starter Pack Getting Started Guide

Version: 8.0.0

Date: 2024-02-07

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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.


Training

Kofax offers both classroom and online training to help you make the most of your product. To learn more about training courses and schedules, visit the [Kofax Education Portal](#) on the Kofax website.

Getting help with Kofax products

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

To access the Kofax Knowledge Portal, go to <https://knowledge.kofax.com>.

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

The Kofax Knowledge Portal 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.
To locate articles, go to the Knowledge Portal home page and select the applicable Solution Family for your product, or click the View All Products button.

From the Knowledge Portal home page, you can:

- Access the Kofax Community (for all customers).
On the Resources menu, click the **Community** link.
- Access the Kofax Customer Portal (for eligible customers).
Go to the [Support Portal Information](#) page and click **Log in to the Customer Portal**.
- Access the Kofax Partner Portal (for eligible partners).
Go to the [Support Portal Information](#) page and click **Log in to the Partner Portal**.
- Access Kofax support commitments, lifecycle policies, electronic fulfillment details, and self-service tools.
Go to the [Support Details](#) page and select the appropriate article.

Chapter 1

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. Go to the TotalAgility installation folder and use the files in `Sample Processes\MFP Starter Pack\Sample Images`. 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


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.

 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.

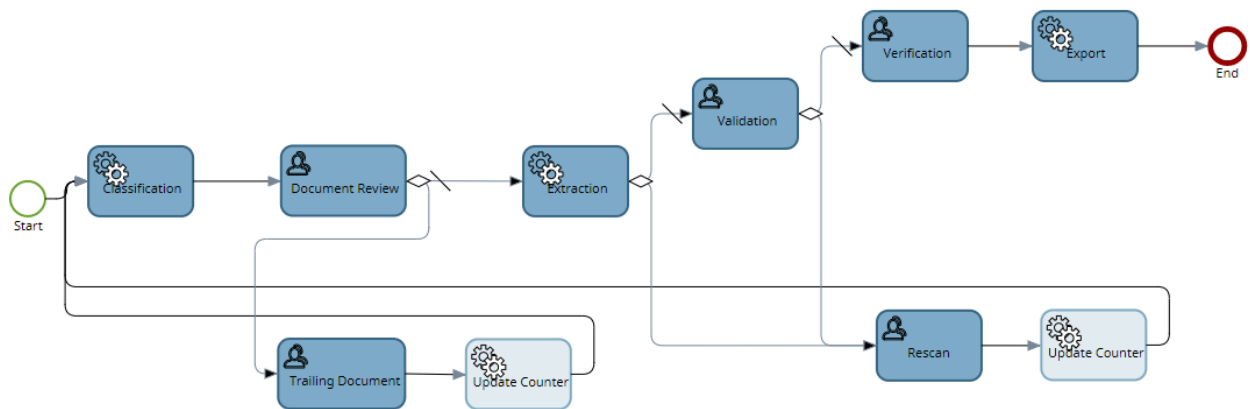
Category

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.

Name	Description
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.
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 the Validation activity.
MFP Starter Pack_Verification_Verification	Activity form for the Verification activity.
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.

i 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	Site
For medium-sized MFP panels. Displays 8-point text.	MFPMediumScreen
For large-sized MFP panels. Displays 11-point text.	MFPLargeScreen

i 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.

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

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.