Kofax

Module 1: Introduction to the Kofax Total Agility 7 Essentials Course

- Classroom Environment
- Course Materials, Software, and Hardware
- Course Roadmap
- Course Objectives
- Use Case Scenario
- Exam Registration
- Introduction to Kofax, Inc.
- What is Kofax TotalAgility?
- Single Platform for Smart Process Applications
- Business Process Management
- Dynamic Case Management
- Mobility Services
- Capture Services
- Transformation Services
- Awareness and Collaboration Services
- Analytics & Business Intelligence Services
- Data Integration Services

Module 2: Installing Kofax TotalAgility 7

- Installation Prerequisites
- Hardware Requirements
- Software Requirements
- Server Operating System
- .NET Framework 4.0
- Silverlight
- Microsoft IIS
- MS SQL Server
- TCP/IP Protocol
- Database user
- Transformation Server user
- Installation steps
- Confirming Services and Applications after Installation

Module 3: Creating a Capture Workflow Process

- Overview
- Process Designer Module

- Basic Process Features, Naming, Properties
- Design a Process with Classification, Document Review, Extraction, Validation, and Verification Nodes
- Moving nodes, Connecting Nodes
- Auto Align a Process
- Save, Release, and Close
- Lock, Unlock a Process
- Create a Category
- Assign a Process to a Category
- Search for a Process

Module 4: Creating Resources

- What are Resources?
- Resources Designer Module
- Create a Resource and Group Resource
- Basic Workflow Rules
- Assign a Resource to a Manual Activity

Module 5: Configuring a Separation Profile, Extraction Group, Classification Group, and Folder Type

- Overview
- Data Designer Module
- Separation Profiles
- Document and Folder Level Separation
- Create a Separation Profile – Document and Folder
- Extraction Group
- What is an Extraction Group?
- Create an Extraction Group
- Create Fields Groups and create Document Types

Module 6: Classification Group

- What is the Classification Group?
- Create a Classification Group
- Add an Extraction Group to a Classification Group

Module 7: Folder Type

- What is a Folder Type?
- Create a Folder Type and create Folder Fields

Module 8: Capture Process Properties, Process Variables, and Capture Node Configuration

- What are Variables?
- Configure Process Capture Properties – Initialize from Scan, Classification group, and Separation
- Create Variables – Document and Folder
- Classification Node Configuration
- Document Review Node Configuration
- Extraction Node Configuration
- Validation Node Configuration
- Configure an Activity SLA

Module 9: Site, Forms and Navigation

- Overview
- Kofax TotalAgility Workspace
- Form Designer Module
- Create a Site (website)
- Create a Manual Login form
- Create a Scan Create New Job Form
- Create Take Activity Forms
- Add Site Navigation
- Access a Site and Forms

Module 10: Introduction to Transformation Designer/Classification

- Overview
- Project Types - Classification, Extraction and Shared
- Opening Projects
- Connection to Kofax TotalAgility Extraction and Classification Groups
- Classification
- What is Classification?
- Layout Classification and Configuration
- Document Sets
- Assign Sample Documents to Classes
- Layout Classification Setup
- Training
- Test Classification

Module 11: Extraction

- What is Extraction?
- Document Sets
- Available Locator Methods
- Locator Properties
- Configure the Advanced Zone Locator

- Cleanup Profiles and Anchors
- OMR Group Zones
- Map Locator Values to Extraction Fields
- Anchors
- View Extraction Results
- Text Extraction

Module 12: Create a Case-Based Process

- Case v Business Process
- Case and Process Design Components, Configuration, Implementation
- Categories
- Node Types: Common, Capture, Microsoft, CMIS, HP TRIM, Script, Other
- Loan Application Use Case scenario

Module 13: Variables and Data Access

- Process Variables
- Server Variables
- System Variables
- Document Variables
- Folder Variables
- Data Access
- Creating a real-time connection to an External Database
- Different Types of Database access (Table, Stored Procedure, View)

Module 14: Email Notifications and Document Creation

- Activity and Email Notifications
- Document Creation

Module 15: Building Additional Forms, Navigation and Security

- Building forms for the Loan Application Process
- Changing Navigation
- Navigation Security
- Form Security

Module 16: Formatting/Customizing Forms

- Formatting/customizing Forms
- Adding Images
- Adding controls
- Repositioning controls

Module 17: Configuring end-to-end Capture Enabled Process

- Connect the Capture Applications Process to the Loan Process
- Loop Node
- Create New Job Node

Module 18: Setting Email and Watched folders as Input Sources

- Setting Email Integration
- Configuring Watched Folders Integration

Module 19: Exporting to Systems of Record

- Text Export Connector
- Downloading and Installing the Connector
- Configuring the Process
- Configuring the Export Connector

Module 20: Configuring an MFP as an Input Source

- Creating the Device Create New Job form
- Configuring the process with a Precondition
- Managing Devices
- Download and install the Multi-Functional Peripherals (MFPs) Emulator
- MFP Emulation

Module 21: Optional – Configuring Mobile Integration as an Input Source

- Configuring the Device Create New Job form
- Mobile Devices and the Mobile App
- App Settings: Connecting to the Kofax TotalAgility Server