

Kofax TotalAgility 6.0.0

Release Notes



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Legal Notice

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Overview

Kofax TotalAgility™ is a BPM and dynamic case management platform that provides all the tools necessary for the entire life cycle of your business processes, from the design, development, test, deploy, use and continuous improvement. Kofax TotalAgility™ 6.0 is the first BPM and Case Management platform deployable on the Microsoft Windows Azure cloud platform. Unlike competing platforms that are "Cloud Enabled" TotalAgility 6.0 has been designed to fully exploit the capabilities of the Microsoft Windows Azure cloud platform.

Cloud BPM delivers the following business benefits:

- **Lower Start-up Costs** – zero infrastructure investment and reduced up front SW cost.
- **Reduced Business Risk** – elimination of large up front capital investment
- **Elasticity and Scalability** – no need to over-provision your infrastructure for short periods of high demand
- **Rapid Prototyping** – immediate access to software to rapidly incubate processes in the cloud
- **Try Before You Buy** – evaluate BPM before making a larger up-front investment.
- **Stay Current** – eliminate unpredictable software upgrade costs and rapidly take advantage of new software features.

Kofax TotalAgility™ 6.0 is deployable both on-premise and off-premise in the cloud. Identical code is used for both on and off premise deployments. Kofax TotalAgility™ 6.0 is available on-premise via a conventional perpetual license or a SaaS based model hosted by Kofax within Microsoft Windows Azure. SaaS is based on a per user per month model.

Features of TotalAgility™ 6.0 include:

- **100% Browser Based** – delivering both process design and execution via a browser interface making the software easier to configure and maintain.
- **Multiple Browser Support** – including support for IE, Safari, Chrome and Firefox. Clients can execute their business processes from any PC, tablet or mobile device.
- **Identical Code for On-premise and Cloud Deployments** - Clients evaluating their cloud strategy have the reassurance that should they wish to deploy on premise today they can migrate to the cloud easily in future as their requirements change.
- **New Web Form Designer** – allowing the creation of more compelling, feature rich HTML5 compliant user interfaces.

The benefits of TotalAgility include:

- **Improved efficiency** – the automation of business processes results in the elimination of many unnecessary steps. This focus on business processes leads to streamlining and simplification.

- **Rapid deployment** - business processes can be rapidly built and deployed across a company utilizing existing I.T. investments, thus maximizing resource productivity.
- **Better process control and cost reduction** - improved management of business processes, achieved through standardizing work methods and monitoring resource utilization.
- **Improved customer service** - enforced consistency leads to increased standardization and a faster response time to customers.
- **Flexibility** - business requirements change as the organization and markets change. TotalAgility provides a graphical business process design tool in which business processes and resources are defined and can easily be changed.
- **Integration with Microsoft SharePoint and Dynamics CRM** - seamless integration with various applications allows you perform a number of tasks directly from TotalAgility.
- **Error management** - provides automated event management capabilities to ensure that the right person or process addresses potential issues before they become costly problems.
- **Rapid creation of forms** - permits the Business Analyst to rapidly create workflow forms to connect people and applications to business processes, without the need for extensive programming.
- **Ease of use** - no coding is required to bind data to forms, or forms to processes. You can drag controls to standard forms and bind process or activity data to the selected controls using a data access wizard.

Superior Design and Execution Experience

Kofax TotalAgility™ 6.0 has been enhanced to accelerate deployment through an intuitive process design and execution experience. The Kofax TotalAgility™ Designer and Workspace components are now completely web-based, making the software easier to configure and maintain.

1 Process Design

The TotalAgility web based designer has been intuitively designed to provide you with a consistent, easy to use, visually appealing user interface. It is aimed initially at non-IT staff such as Business Analysts and focuses on enhanced business process modeling ultimately making significant organizational gains such as improved productivity, reduced cycle times and reduced costs through better management of business processes.

2 Form Design

The TotalAgility web based Web form designer has been enhanced to enable users to create more compelling web pages using our more intuitive grid and flow layout.

3 Form Execution

All TotalAgility forms are now rendered via a new forms web server which generates HTML enabling full process participation to multiple browsers and devices such as smartphones, tablets and laptops.

4 Integration of TotalAgility with Microsoft SharePoint and Dynamics CRM

Seamless integration with various applications allows you perform a number of tasks directly from TotalAgility. For example, integration with Microsoft SharePoint helps you efficiently manage your documents and records. For an event that occurs in SharePoint, you can configure and execute a TotalAgility action to create a job, change the state of a job or raise an event.

You can link to Dynamics CRM and access one or more business units to efficiently manage CRM activities like creating, retrieving and updating various business unit entities.

Key Features

Kofax TotalAgility™ 6.0 continues to provide our key market-leading functionality:

- **Case Management**

Unlike competing systems the builder provides extensive support for modelling knowledge intensive processes, enabling case management features such as case definitions, dynamic process attachment and virtual case folders.

- **Resource Management**

Resources are integral to the setting up and creation of a business process map; Kofax TotalAgility™ enables concise management and monitoring of these resources.

- **Data Management**

There are many data management features within Kofax TotalAgility™ with Entities as a key feature. Entities are business data objects that enable you to group the data, such as name, address for your business object in one container, and can be identified by a unique identifier such as Employee, Customer, Product.

- **SLA Management**

SLA management is crucial to the success of any operation. Kofax TotalAgility™ provides SLA Status Indicators which are the visual representations of a job state on a job list or work queue. SLA Status Indicators help to get an instant understanding of a job with respect to the Service Level Agreement (SLA). . Kofax TotalAgility™ provides the capability to monitor and escalate these as appropriate.

- **Escalation Management**

The TotalAgility exception handling capability allows pre-emptive escalation. You can define triggers and escalation maps that help you better manage your business processes, the system can alert you BEFORE projects overrun or go over budget.

- **Zero Code Integration**

TotalAgility is a zero code environment enabling customers to deliver faster and more frequent process innovation without expensive reliance on IT-delivered, code-based changes. It provides as standard, web browser-based forms and email generation with no requirement for custom software development.

- **Dashboards**

In ever changing business conditions it is important to know trends and patterns in enterprise performance for proactive and informed decision making in daily business operations. You can design a dashboard, and view it on any mobile device. The dashboard enables you to display real-time business information you wish to monitor in a colorful graphical format. Each department, each level of an organization, even each individual, can create their own personalized dashboards that focus on the Key Process Indicators (KPIs) and areas important to their specific targets and objectives.

- **Reporting and Monitoring**

Knowledge is vital in any business therefore Kofax TotalAgility™ not only provides an intuitive report designer but also enables these reports to be included within the workspace and custom web based forms so that all data is easily accessible.

- **Workspace**

The TotalAgility Workspace delivers the Right Work to the Right Person at the Right Time. The workspace enables the user to engage in process execution in a way appropriate to their role. The workspace allows process participants to work efficiently, effectively, intelligently and transparently, while also delivering the ability to improve the processes designed in the TotalAgility Designer.

Product Environment

The product environment includes the server configuration and supported browsers.

- **Server Configuration**

The following are supported:

- Windows Server 2008 and above plus Azure.
- SQL 2008 (with latest Service Pack installed),

- **Supported Browsers**

The following browsers and the mobile equivalents are supported:

- IE 9 & 10
- Mozilla Firefox 9 & 10
- Chrome 16 & 17
- Safari 4 & 5

