Kofax
TotalAgility
for Microsoft SharePoint

TotalAgility web forms hosted seamlessly in SharePoint.

Business Process Management and Dynamic Case Management for Microsoft SharePoint

Kofax® is the leader in providing Business Process Management (BPM) & Dynamic Case Management solutions for Microsoft®. Kofax TotalAgility™ has been recognized by leading analysts as the most complete and advanced BPM platform solution, and our dedication to the Microsoft ecosystem provides your organization the greatest process advantages and return on investment from your Microsoft products.

The TotalAgility BPM Suite and SharePoint 2010

Kofax TotalAgility and Microsoft SharePoint® are complementary products. TotalAgility is a Capture Enabled BPM™ suite that enables customers to further leverage the functionality within SharePoint to deliver complete end to end BPM and Dynamic Case Management solutions.

TotalAgility is a zero code environment integrating with SharePoint out-of-the-box. As a result SharePoint users can deploy BPM and Dynamic Case Management solutions quickly without relying on expensive IT code based changes. Customers have the choice of using a TotalAgility generated workspace for their process participants or utilizing a Microsoft web portal.

For companies that use SharePoint sites as their primary web portal and productivity space for employees, TotalAgility web parts are customizable web page components that can easily be plugged into an organization's SharePoint portal. As an alternative to web parts "out-of-the-box" web pages are provided that allow TotalAgility forms to be hosted seamlessly in SharePoint.
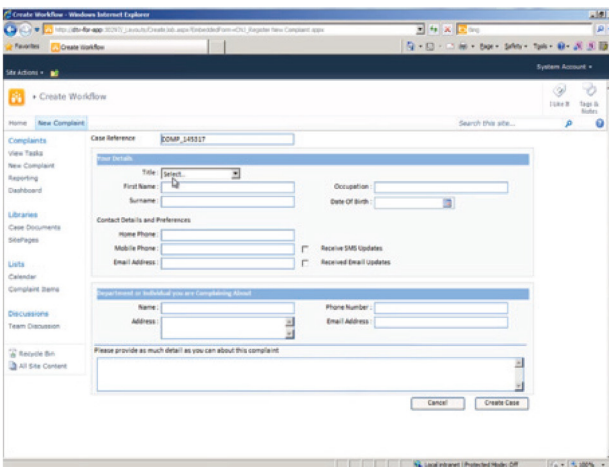
The TotalAgility product also comes with an "out-of-the-box" Dynamic Case Management site template to use when creating a SharePoint site. As a result Kofax customers can execute BPM and case activities from within their familiar SharePoint workspace.

Why not just use SharePoint for BPM and Case Management?

While SharePoint has native support for Windows Workflow Foundation enabling users to deliver simple linear, document centric, processes it is not a true BPM platform.

Business processes span many platforms (Microsoft and non-Microsoft) as a result there is a need for process orchestration. TotalAgility delivers industry leading business process orchestration of both Microsoft and non-Microsoft business applications.

SharePoint workflows are custom developed. Development can be a code-intensive, expensive process. In addition it is difficult to re-use workflow components elsewhere leading to inflexibility and lack of agility in the final solution. TotalAgility empowers the analyst and does not rely on a team of software developers. In addition any developed workflows can be reused on other business processes.

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SharePoint generated workflows are executable programs and cannot be changed at runtime. The ability to support in-flight process change is a core feature of TotalAgility. In addition the software delivers escalation, exception handling, optimization and monitoring tasks which are critical to complex processes and are not supported by SharePoint workflows.

Finally, building the workflow is only part of the solution. The finished process requires user screens, business rules, integration into third party systems, a configuration management and release mechanism as well as support for testing and upgrade processes.

Benefits

The TotalAgility product delivers the following business benefits to SharePoint users:

- Enables users to deploy BPM and Case Management solutions rapidly.
- Delivers support for complex business processes.
- Enables in-flight process change and Dynamic BPM.
- Equips staff, customers and partners with the ability to interact with business processes using familiar Microsoft SharePoint interfaces.
- Delivers self-documentation of processes.
- Enables process orchestration between the TotalAgility product, SharePoint, Dynamics® CRM, Lync®, Visio®, Office, Outlook as well as non-Microsoft business applications.
- Orchestrates business processes across multiple data sources including SharePoint, Dynamics CRM, SQL Server as well as third party and bespoke data sources.
- Delivers an end-to-end solution; workflow generation, testing, user screens, business rules, 3rd party integration and release management.
- Allows workflows to be reused on multiple business processes.

Features

The TotalAgility product's SharePoint Integration enables users to:

- Create SharePoint sites, folders and sub-folders.
- Automatically upload a document to a document library in SharePoint.
- Automatically perform document Check In/Check Out.
- Automatically delete an item.
- Add Folder to Document Library.
- Utilize Unique SharePoint (GUID) Identifiers.
- Move Documents.
- Configure and execute TotalAgility actions resulting from SharePoint. For example the events in SharePoint for which the TotalAgility product actions can be configured include: added, updated, deleted, changed, checked in/out and undo check out.

- Utilize SharePoint Fault Tolerance within the TotalAgility BPM solution or Case Management solution.
- Embed the TotalAgility web parts within a SharePoint portal.
- Available web parts include: Login, Workqueue, Create New Job, or Fragment, Complete Activity, Job List, Job Notes and Job Properties.
- Out-of-the-box web pages are provided, that allow the TotalAgility forms to be hosted seamlessly in SharePoint.

Kofax & Microsoft

TotalAgility fully integrates with, and extends the Microsoft family of products. The TotalAgility suite deploys on Microsoft .NET and utilizes industry standards such as BPMN, web services and LDAP to allow users to design, develop, deploy and monitor complex BPM solutions without the need to write any code. Automatic generation of user forms and web parts means the resulting process solutions can be easily deployed within an existing Microsoft environment.

TotalAgility uses a SQL Server database, and utilizes and extends many of the features of the Microsoft family including SharePoint, Dynamics CRM, Exchange, Lync, Microsoft Office and Windows 7 mobile.

TotalAgility runs on Windows Server 2008, Microsoft Windows 7, Vista and XP and provides a browser interface which supports all common desktop browsers including Internet Explorer. Other Microsoft products such as Silverlight® and Visio® are used as part of the graphical design environment.

About Kofax

Kofax® plc (LSE: KFX) is a leading provider of innovative smart capture and process automation software and solutions for the business critical First Mile™ of customer interactions. These begin with an organization's systems of engagement, which generate real time, information intensive communications from customers, and provide an essential connection to their systems of record, which are typically large scale, rigid enterprise applications and repositories not easily adapted to more contemporary technology. Success in the First Mile can dramatically improve an organization's customer experience and greatly reduce operating costs, thus driving increased competitiveness, growth and profitability. Kofax software and solutions provide a rapid return on investment to more than 20,000 customers in financial services, insurance, government, healthcare, business process outsourcing and other markets. Kofax delivers these through its own sales and service organization, and a global network of more than 800 authorized partners in more than 75 countries throughout the Americas, EMEA and Asia Pacific.

For more information, visit www.kofax.com.

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