Kofax Analytics for TotalAgility Administrator's Guide Version: 1.4.0

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Preface

This guide includes instructions for installing, configuring and upgrading Kofax Analytics for TotalAgility. Read this guide completely before using the software. This guide was written with the assumption that you have a thorough understanding of Kofax TotalAgility and Kofax Insight.

Related documentation

The full documentation set for Kofax Analytics for TotalAgility is available online at the following location:

https://docshield.kofax.com/Portal/Products/KAFTA/1.4.0-3k8rtu8xuv/KAFTA.htm

In addition to this guide, the documentation set includes the following items:

- Kofax Analytics for TotalAgility Release Notes: The release notes contain late-breaking product information that may not be included in other Kofax Analytics for TotalAgility documentation.
- Kofax Analytics for TotalAgility Product Features Guide: The guide provides an overview of product features. This information can help you decide which features are important to the business challenges you face and best-suited your company's needs.
- Kofax Insight Documentation: The product documentation for Kofax Insight 6.0.0 is hosted online: http://docshield.kofax.com/Portal/Products/Insight/600-j3y2jmmw57/Insight.htm

Offline documentation

To access the documentation offline (without an Internet connection), you can download it from the Kofax Fulfillment Site. The documentation package is available to download as a compressed file, KofaxAnalyticsforTotalAgilityDocumentation1.4.0_EN.zip for English. The .zip file includes a print folder that contains the *Product Features Guide* and the *Administrator's Guide*.

Training

Kofax offers both classroom and computer-based training to help you make the most of your Kofax solutions. Visit the Kofax website at www.kofax.com for details about the available training options and schedules.

Getting help for Kofax products

Kofax regularly updates the Kofax Support site with the latest information about Kofax products.

To access some resources, you must have a valid Support Agreement with an authorized Kofax Reseller/ Partner or with Kofax directly.

Use the tools that Kofax provides for researching and identifying issues. For example, use the Kofax support site to search for answers and messages, keywords, and product issues. To access the Kofax Support page, go to www.kofax.com/support.

The Kofax support page provides:

- Product information and release news.
 Click a product family, select a product, and select a version number.
- Downloadable product documentation. Click a product family, select a product, and click **Documentation**.
- Access to product knowledge bases. Click **Knowledge Base**.
- Access to the Kofax Customer Portal (for eligible customers). Click **Account Management** and log in.
- Access to support tools.
 Click **Tools** and select the tool to use.
- Information about the support commitment for Kofax products.

Click Support Details and select Kofax Support Commitment.

Use these tools to find answers to questions that you have, to learn about new functionality, and to research possible solutions to current issues.

Note To optimize your use of the support portal, go to the Kofax Customer Portal login page and click the link to open the *Guide to the Kofax Support Portal*. This guide describes how to access the support site, what to do before contacting the support team, how to open a new case or view an open case, and what information to collect before opening a case.

Chapter 1

Introduction

Kofax Analytics for TotalAgility is an extension of Kofax TotalAgility that tracks data as it moves through the workflow and produces Business Intelligence dashboards from the collected data.

When using linked servers in TotalAgility, Reporting (Capture) information is sent to the main TotalAgility server from the linked TotalAgility servers. The core BPM data still resides at the distributed sites. You configure Kofax Analytics for TotalAgility to include Reporting (Capture) information from the main server and to include BPM information directly from each linked Kofax TotalAgility server.

Kofax Analytics for TotalAgility includes the following:

- Viewer: Use to display the data in standard or custom views generated from data stored within the Kofax Analytics for TotalAgility database.
- Insight Studio: Use for creating and editing views.

For information about the dashboards in Kofax Analytics for TotalAgility, see the Kofax Analytics for TotalAgility Product Features Guide.

Chapter 2

Requirements

Before you install Kofax Analytics for TotalAgility, ensure your system meets the software and database requirements listed in this chapter. For information about other products supported for use with Kofax Analytics for TotalAgility, see the KAFTA 1.4 Technical Specifications document available on the Kofax website at www.kofax.com.

Software requirements

This section provides information about Kofax Analytics for TotalAgility software requirements.

- Kofax Insight 6.0.0.1 or higher (see the Kofax Insight Installation Guide to install and configure Insight).
- Insight 6.0 license for Kofax Analytics for TotalAgility.
- Kofax TotalAgility 7.5.0 and higher (includes Kofax Reporting)

Note See the Kofax TotalAgility Installation Guide to install TotalAgility.

Databases

Kofax TotalAgility databases

When creating or using logins, ensure that the logins map to a proper schema in the corresponding Kofax TotalAgility databases.

Insight databases

For the initial setup, we recommend that you create the following databases: (KAFTA_Admin, KAFTA_Meta and KAFTA_Data) and configure the Installation Manager specifying the SQL user.

Configure the Installation Manager

- 1. Log on to SQL Server.
- 2. Ensure that you have access to Use SQL Server and Windows Authentication mode.
 - a. Right-click the database server (the root database) and click Properties.
 - b. Select the security page and verify that SQL Server and Windows Authentication is selected.
 - c. Click OK.
- 3. Create three databases.

Note You can auto-create databases during project creation.

- a. KAFTA_Admin
- b. KAFTA Meta
- c. KAFTA Data
- 4. Create a user.
 - a. Navigate to Security and right-click Logins.
 - b. Click New Login.
 - c. Select SQL Server Authentication.
 - d. Enter a username for the user.
 - e. Clear the Enforce Password Policy.
 - f. Enter a password for the user.
 - **g.** Select the **User Mapping** property of the new login and grant the **db_owner role** membership to the following databases.
 - KAFTA_Admin
 - KAFTA_Meta
 - KAFTA_Data

Note The preceding databases should use a SQL user with the db_owner role even if they are distributed across multiple servers. The db_owner role should also be applied to any SQL user assigned to the following TotalAgility data sources:

- TotalAgility
- TotalAgility_Finished
- TotalAgility_Reporting (Kofax TotalAgility Reporting Database)
- TotalAgility_<tenant_name> (for an on-premise multi-tenancy environment)
- 5. Click OK.

Enable Windows Authentication for Insight sites

If Windows Authentication is enabled for TotalAgility in IIS, you must install Insight with the Windows Authentication option selected (see "Appendix C–Install Insight with Windows Authentication" in the *Kofax Insight Installation Guide*).

You must enable Windows Authentication for all the Insight sites in IIS as well; otherwise, the 401.2 error occurs while trying to access the Insight Home page.

- 1. In the IIS, drill down to the Default Web Site.
 - The following Insight sites are listed:
 - DataFileProcessorService
 - · Insight and its subfolders

- WcfDataService
- **2.** Select the Insight site.
- 3. In the Features View, double-click Authentication.
- 4. Right-click Windows Authentication and click Enable.

Use SSL

Enable SSL (Secure Sockets Layer) communication to secure Kofax Analytics for TotalAgility to allow successful communication between web services.

Note If SSL is enabled, Insight must be installed with SSL selected. See step 3 in "Run the Insight Installation Manager" in the *Kofax Insight Installation Guide*. If Insight is installed without SSL, run the Insight Installation Manager from the Start menu. To reconfigure Insight to use an SSL connection, see "Change Insight configuration after installation" in the *Kofax Insight Installation Guide*.

Any SSL certificates being used must be fully trusted. You can enable SSL for Kofax Analytics for TotalAgility at the time of installation or post installation.

Import an SSL certificate

- 1. Open Internet Information Services (IIS) Manager.
- 2. On the Features View, double-click Server Certificates.
- 3. Under Actions, click Import.
- 4. Browse and select the certificate name.
- 5. Enter the Server certificate password.
- 6. Click OK.

Enable SSL for Insight application

- 1. Open Internet Information Services (IIS) Manager.
- 2. Right-click the Default Web Site and click Bindings.
- 3. Click Add.
 - a. On the Type list, select https.
 - b. On the SSL certificate list, select the certificate.
 - c. If installing a separate web server, additionally specify the IP Address of the web server, and the port number.
 - d. Click OK.
- 4. Click Insight and click SSL settings on the Features tab.
 - a. Select Require SSL.
 - b. For Client Certificates, select Accept and click Apply.

Use the same time zone

You must install Insight on the same time zone as Kofax TotalAgility. The TotalAgility databases as well as all the Insight servers and databases must also be in the same time zone; otherwise, the data will be lost on many (if not all) views.

Chapter 3

Install Kofax Analytics for TotalAgility

This chapter describes two methods for installing Kofax Analytics for TotalAgility.

- · Silent installation
- Standard installation

Perform a silent installation

Use the silent installation method to install Kofax Analytics for TotalAgility 1.4.0 without any user interaction.

You can find the silent installer in the InstallTools folder in KofaxAnalytics-1.4.0_For_TotalAgility.zip. It is called SilentInstall.zip. Extract the files from the SilentInstall.zip and follow the instructions in readme.txt.

Note When you install Kofax Analytics for TotalAgility in silent mode, it also installs Kofax Insight.

Perform a standard installation

Before installing Kofax Analytics for TotalAgility, ensure that Kofax Insight is installed on your computer. See the *Kofax Insight Installation Guide*.

Kofax Analytics for TotalAgility requires the following files:

- KofaxInsightSetup installer (Download a copy of the Kofax InsightSetup installer from the Kofax website or obtain a link from your Kofax representative. Also, download the installer for fix pack to get Insight.)
- · Project_KAFTA-1.4.0.0: Dashboard files (should not be extracted) within the Project folder

Note

- You must have a database account with administrator rights to auto-create the databases you need. If you do not have administrator rights, you must create the administrator database prior to installing Insight. In this scenario, you define a user with database ownership rights.
- Before extracting KofaxAnalytics-1.4.0_For_TotalAgility.ZIP file, unblock the file from the File Properties window.

Extract the KofaxAnalytics-1.4.0_For_TotalAgility.zip folder on the server where Insight is installed.

Create a new Kofax Analytics for TotalAgility project

To create a new Kofax Analytics for TotalAgility project, perform the following steps.

- 1. Navigate to Start > All Programs > Insight > Admin Console.
- 2. On the Documents Tree, right-click Projects and select New.
- 3. In the pop-up, enter KAFTA (suggested project name).
- 4. In the Create New Project window, click the Import from file tab.
- 5. To select the Kofax Analytics for TotalAgility project file, do the following:
 - a. Click the ellipsis adjacent to the **Select file** box. The Open file pop-up appears.
 - **b.** In the Open file pop-up, select either option:
 - File is located on the client computer and will be copied to the server for processing: Allows you to select the Project_KAFTA-1.4.0.0.zip file from the Project folder on your local machine.
 - File is located on the server: Allows you to select a file from the server.
 - c. Click OK.
- 6. Enter the server name and database name and the login credentials to access the KAFTA_Meta and KAFTA_Data databases.
- 7. Click Connect to test if the connection to the database is established.

Note The connection will fail if these databases do not exist.

- **8.** Click **OK** to create a project. A confirmation pop-up appears.
- **9.** To create a new database or update a pre-existing database, click **Yes** in the confirmation pop-up. Otherwise the KAFTA_Meta and KAFTA_Data databases are not created or updated.

Note Login credentials must have database owner rights to create the databases manually. If the databases are created by Insight, the assigned user is granted database owner rights automatically.

- 10. Wait until the project is created. A message confirms that the import is successful.
- 11. Click OK.

Configure database connections for the project

1. Navigate to Insight Admin Console > Projects > KAFTA.

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- 2. Click Projects > KAFTA > Data DB.
- 3. Click Connect to verify the Data database connection.
- 4. Similarly, enter or verify the connections for ReportingDB, TotalAgilityDB and TotalAgilityFinishedDB.

Note

- If you do not have separate databases for live and finished jobs, provide the name of the main database connection for both TotalAgilityDB and TotalAgilityFinishedDB. See Potential Database Connection Values.
- To configure multiple Kofax TotalAgility servers with Kofax Analytics for TotalAgility, you must specify one or more database connection credentials for TotalAgilityDB and TotalAgilityFinishedDB data sources. To specify these credentials, you must select the check box for **Support multiple connections** in the **Property panel** for the data source.
- 5. Click Save.

Potential database connection values

The configuration of the database depends on the deployment type. See the following examples of database connection values.

For On-Premise

Data database

- Server Name: KAFTA-DB (DB Server hosted locally)
- User Name: tester (this user has the privileges defined in the guide)
- Database name: KAFTA_Data
- Password: xyz1

Reporting and TotalAgility databases

- Server Name: KTA-DB
- User Name: tester (this user has the privileges defined in the guide)
- · Database name: TotalAgility_Reporting, TotalAgility, TotalAgility_Finished
- Password: xyz1

For On-Premise Multi-Tenant

Data database

- · Server Name: Insight-DB (DB Server hosted locally)
- User Name: tester
- Database name: KAFTA_Data
- Password: xyz1

Reporting and TotalAgility databases

- Server Name: OPMT-KTA (DB Server hosted locally)
- User Name: tenant1_live (This user is created during tenant creation. This user maps directly to the _live schema, which contains both TotalAgility and Reporting information)
- Database name: TotalAgility_tenant2 (one database instance is deployed in Azure with multiple schemas: _live, _dev, _reportingstagingdev, _reportingstaginglive_, simulatorlive, simulatordev).
- Password: kA2B1746214XXXXXXXXF3833333335 (password generated during tenant creation)

Note Retrieve the credentials (user name and password), and database name from the Database Connection section of the Tenant Manager screen for the specific tenant being configured for Kofax Analytics for TotalAgility. Click the Connect button to validate the credentials.

Configure TotalAgility connections

1. Navigate to Insight Admin Console > Connections > TotalAgility.

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E KAFTA	~	<u></u>							
🗐 Data DB									
ReportingDB		Database type Server Name User Name							
Staging DB		MS SQL Server • FBCK0PIIHKHLK3V.RNDQA.SINGULARITY.C TenantABC_live Connect							
TotalAgilityDB		Provider name Database Name Password							
TotalAgilityFinishedDB		Sql server Provider 🔹 TotalAgility_TenantABC							
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TotalAgility									
요 Users	>								

- 2. Enter the details, as provided for the TotalAgility Main database.
- 3. Click **Connect** to verify the TotalAgility database connection.
- 4. Click Save.

Configure TotalAgility processes

For each process to produce data viewable in Kofax Analytics for TotalAgility, set the Include in Analytics property for each process in Kofax TotalAgility.

- 1. Log on to Kofax TotalAgility Designer.
- 2. On the Kofax TotalAgility Home page, click **Process Designer > Process**.
- 3. Select and open the required process map.
- 4. On the Extended Properties page, click the Advanced tab.
- 5. In the Data group, set the Include in Analytics property to Yes.
- 6. Click Save.

Integrate Kofax TotalAgility with Insight

- 1. Log on to Kofax TotalAgility Designer.
- On the Kofax TotalAgility Home page, click Integration > Insight and configure the following settings.
 - a. Server URL http://127.0.0.1 or http://MyComputer

Note

- If pointing to Insight on an external computer, replace http://127.0.0.1 with the computer's IP address, such as http://198.63.65.19/.
- If SSL is enabled during Insight installation on the Insight server, use https in place of http in the URL.
- b. Enter the User name and Password.

Note The logged-on user must have the following rights:

- Application rights to Studio
- View rights to view KAFTA
- Studio rights to view KAFTA
- 3. Click OK.

A message appears to notify that the page needs to be refreshed for Insight to be successfully integrated.

4. Refresh the page.

When the web page reloads, the option for Insight appears on the Kofax TotalAgility Home page.

Configure user mapping for On-Premise Multi-Tenant

Note In the TotalAgility On-Premise environment, the user mappings are configured automatically.

1. Navigate to Insight Admin Console > User Mapping.

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✓ Roles >	Source: TotalAgility	
	Database:	
√ Filter group	Any *	
△ Alerts	SELECT LIVE AW RESOURCE RESOURCE ID FROM LIVE AW RESOURCE JOIN LIVE AW LOGGEDON USER ON	
✤ Distribution	Live AW_LOGGEDON_USER.RESOURCE_ID = Live AW_RESOURCE.RESOURCE_ID AND SESSION_ID = CONVERT(binary(16),'session_id>'.2)	
Calendars		
Aggregate		

- 2. Under the User Identifier section, do the following:
 - a. Select Database query.
 - b. On the Source list, select TotalAgility.
 - c. Enter the following SQL query:

```
SELECT CONVERT(NVARCHAR(99),LIVE.AW_RESOURCE.RESOURCE_ID,1) FROM
Live.AW_RESOURCE JOIN Live.AW_LOGGEDON_USER
ON Live.AW_LOGGEDON_USER.RESOURCE_ID = Live.AW_RESOURCE.RESOURCE_ID AND
SESSION_ID = CONVERT(binary(16),
'<session_id>',2)
```

Note If you copy and paste the code from this guide, fix the line breaks.

- 3. Click the User Name and tab do the following:
 - a. Select Database Query.
 - b. On the Source list, select TotalAgility.
 - c. If connecting to the Live Schema in the On-Premise Multi-Tenancy configuration, enter the following SQL query:

```
SELECT RESOURCE_NAME FROM Live.AW_RESOURCE JOIN Live.AW_LOGGEDON_USER ON
Live.AW_LOGGEDON_USER.RESOURCE_ID = Live.AW_RESOURCE.RESOURCE_ID_AND
SESSION_ID = CONVERT(binary(16),
'<session_id>',2)
```

d. If connecting to the Dev Schema in the On-Premise Multi-Tenancy configuration, enter the following SQL query:

```
SELECT RESOURCE_NAME FROM Dev.AW_RESOURCE JOIN Dev.AW_LOGGEDON_USER ON
Dev.AW_LOGGEDON_USER.RESOURCE_ID = Dev.AW_RESOURCE.RESOURCE_ID AND SESSION_ID
= CONVERT(binary(16),
'<session id>',2)
```

4. Click Save.

Configure user roles for On-Premise Multi-Tenant

Use Roles to configure the application and view rights as well as the external database mappings. By default, you need to configure the external database mappings for the KTA Admin Role and the KTA Role.

Note In the TotalAgility On-Premise environment, the user role is configured automatically. For On-Premise Multi-Tenant environment, configure the following roles.

Configure TotalAgility Admin Role

1. Navigate to Insight Admin Console > Roles > KTA Admin Role.

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री kta	Source:	
<u> </u> ktaadmin	TotalAgility	•
loser mapping	Database:	
✓ Roles	Any	•
Default role Administrator KTA Admin Role	DECLARE @MyisValid bit Exec Live.IsUSerInsightAdmin ' <session_id>', @IsValid=@MyisValid output SELECT 1 WHERE @MyisValid=1</session_id>	^
✓ KTA Role Ť User filters		

- 2. Click the External DB mapping tab.
- 3. In the Source list, select TotalAgility.
- 4. Enter the following query:

```
DECLARE @MyisValid bit
Exec Live.lsUserInsightAdmin '<session_id>',@isValid=@MyisValid output
SELECT 1 WHERE @MyisValid=1
```

Note If you copy and paste the query from this guide, fix the line breaks.

Configure the KTA Role

1. Navigate to Insight Admin Console > Roles > KTA Role.

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<u>़</u> kta		Source:	
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✓ Roles	~	Any	•
 Default role Administrator KTA Admin Role 		DECLARE @MyisValid bit Exec Live.lsUserInsightUser ' <session_id>', @isValid=@MyisValid output SELECT 1 WHERE @MyisValid=1</session_id>	<
✓ KTA Role Ť User filters	>		
∀ Filter group			

- 2. Click the External DB mapping tab.
- 3. In the Source list, select TotalAgility.
- 4. Enter the following query:

```
DECLARE @MyisValid bit
Exec Live.lsUserInsightUser '<session_id>',@isValid=@MyisValid output
SELECT 1 WHERE @MyisValid=1
```

5. Click Save.

Configure TotalAgility resources

- 1. Log on to Kofax TotalAgility Designer.
- 2. On the Kofax TotalAgility Home page, click Resources.
- 3. In the Explorer panel, click Resources.

The Insight Admin and Insight Users groups are automatically created and listed in the Explorer panel.

Note You do not need to create a Kofax TotalAgility resource or group within TotalAgility. The TotalAgility Administrator must be added to the Insight Admin group.

- 4. Add members to the Insight Admin group:
 - a. Select the Insight Admin group icon and click Open.
 - b. Under Groups: Members field, drag the resources that should be granted Administrator rights.
- 5. Click Save.

6. Repeat the same procedure to add members to the Insight Users group.

Configure Kofax TotalAgility to access Insight

You must be a member of the **Designer** group in TotalAgility to configure TotalAgility to access Insight.

- 1. If you are not already logged in, log in to Kofax TotalAgility Designer.
- 2. On the Kofax TotalAgility Home page, click Form Designer.
- 3. On the Explorer pane, click Navigations.
- 4. Click the navigation to modify, such as WorkspaceMenu.
- 5. To add a new menu item, select the navigation such as WorkspaceMenu item and click Add +.
- 6. Enter a name for the Menu Item Name.
- 7. Under Redirect group, select Insight for Type.
- 8. Click the Views icon in the Target box.
- 9. From the list of Views, consume the KAFTA view as your default view in the Target box.

Note If you are unable to consume the KAFTA view, ensure the user name and password for the Administrator user are correctly set in TotalAgility (On the Kofax TotalAgility Home page, click **Integration > Insight**).

You can log in to the Kofax TotalAgility Workspace and access the Insight KAFTA View using the menu item you have created. Also see Unable to Log in to Insight Studio.

10. Click Save.

Load data

You can load the following three plans:

- One Time Plan
- Minute Plan
- Hourly Plan

Note

- When loading the data, you must always run the One Time Plan before running the Minute and Hourly plans.
- The One Time Plan must be executed at least once; otherwise, you will not see any data in the Kofax Analytics for TotalAgility landing page.
- The Hourly plan in Kofax Analytics for TotalAgility 1.4 should always be set to run from a date after the TotalAgility 7.5.0 installation date.
- 1. Navigate to Start > All Programs > Insight > DATA LOADER.
- 2. On the Execution plans tab, select the project with one time execution plan. For example:
 - PROJECT: KAFTA

- EXECUTION PLAN NAME: One Time Plan
- 3. Click Load.
- 4. Under the **Date range** section, do the following:
 - a. Under From date, select Beginning of times.
 - b. Under To date, select Current time.
 - c. Select the Save To date as the date of last successful load check box.
 - d. Click Load data and wait for data load to complete.

Note When performing a manual data extraction load, ensure that only the Minute Plan and Hourly Plan are selected.

5. Repeat the same steps for the Hour Plan or Minute Plan.

Note After the initial data load, data will be loaded by the "Minute" and "Hourly" execution plans according to the default schedule, which is every 1 minute and every 1 hour respectively. (By default, the Hourly plan is executed at 5 minutes past the hour.)

Handle data load

When data extraction fails, you can configure Insight to send you an email notification. After receiving a notification, you should extract data manually for the corresponding time period.

Configure email alerts in Kofax Analytics for TotalAgility

Ensure that email settings are configured in Insight. For details, see Help for Kofax Insight Studio.

1. In Insight Studio, on the Documents Tree, click **Tools**.



2. Click the Settings icon.

The Studio Settings window opens.

- 3. In the search box, enter email.
- 4. Select the **Data load errors email recipient** option from the search result and enter the email ID of the recipient.
- 5. Click OK to confirm the email address.

Manually load data

To manually load information from TotalAgility to the Data warehouse, see Load data.

Troubleshooting

Duplicate entries present

When consolidating information from multiple servers, be aware that duplicate entries may exist within the reports. For example, where Resource groups with the same names exist, they may appear multiple times in reports unless they have the same unique identifier.

For example, the Administrators resource group is created by default and has unique identifiers on each computer and therefore appears separately within the Insight reports.

As a workaround, you can rename the Administrators group to something more explicit, such as Server1_Administrators and Server2_Administrators.

Unable to log in to Insight Studio from the Kofax TotalAgility Workspace

If at any stage you are unable to log on to Insight Viewer from TotalAgility Workspace, do the following:

- 1. Open Insight Admin Console.
- 2. Click the Users tab.
- 3. Re-enter your password in both the **Password** and **Confirm Password** fields for the KAFTA Users.
- 4. If you are still not able to log in to Insight Studio from Kofax TotalAgility Workspace, perform an IISReset and refresh the page.

Delete all previous data

You can delete all the data that was previously loaded into Insight.

Note The Reporting data remains intact and can be reloaded into Insight.

1. Navigate to Insight > Studio > Tools > Publish and rebuild.

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- Confirm action when prompted. The "Publishing validation results" page appears.
- 3. Click Continue Publishing after the metadata is validated.

Chapter 4

Upgrade process

This chapter gives instructions for upgrading to Kofax Analytics for TotalAgility 1.4.0.

You can upgrade to Kofax Analytics for TotalAgility 1.4.0 either manually or in silent mode.

Prerequisites

Before upgrading to Kofax Analytics for TotalAgility 1.4.0, we strongly recommend that you perform the following steps:

- 1. Back up your KAFTA Meta and KAFTA Data databases from the previous installation. For example, KAFTA1.2 R2.
- 2. Use the Insight Administrator credentials to log in to Studio if your license provides access to Studio.
- Test and note all credentials (server name, database name and user name) for the following databases: KAFTA Data and KAFTA Meta, TotalAgility, TotalAgility Reporting and TotalAgility Finished. You will need these credentials when upgrading to Kofax Analytics for TotalAgility 1.4.0.

Upgrade to Kofax Analytics for TotalAgility 1.4.0

After upgrading to Kofax Analytics for TotalAgility 1.4.0, the deprecated views contain historical data. However, for the historical data to continue to be populated, the administrator must enable the Load Deprecated Data for the Hourly Plan.

To optimize the performance of the Hourly Plan, the Load Deprecated Data option is not enabled by default. Even if this option is not enabled, the deprecated views still display the partial data that is not accurate. To continue populating the deprecated views, you must enable the Load Deprecated Data option from the Studio.

The new Documents views in Kofax Analytics for TotalAgility 1.4 are only populated after:

- The data is generated after successful installation of Kofax TotalAgility 7.5, or later.
- That data is successfully loaded by the Kofax Analytics for TotalAgility 1.4.0 Hourly Plan.

The preceding requirements apply to the following new views:

- Deleted Documents and Pages
- Rejections
- Resource Productivity
- Document Processing Time
- No Touch Processing

- Classification Statistics
- Classification Chart
- Classification Benchmark
- Extraction Statistics
- Extraction Chart
- Extraction Benchmark

The Separations, Reclassifications, Fields Changed and Keystrokes columns in the Resource Productivity and Document Processing Time views will be empty for data generated by earlier versions of Kofax TotalAgility.

The No Touch Processing, Classification (Statistics, Chart, and Benchmark), and Extraction (Statistics, Chart, and Benchmark) views only include the documents that have been marked Capture Complete in Kofax TotalAgility 7.5.0. You can configure a Delete or Export process activity to Mark Completed in Kofax TotalAgility Designer, or call the CaptureDocumentService.UpdateDocumentsProcessingCompleted API.

Note The records and metrics available in Kofax Analytics for TotalAgility 1.3.0 continue to work after upgrading to Kofax Analytics for TotalAgility 1.4.0, so that your custom views and alerts are not negatively affected by the upgrade.

Accuracy Changed Field Count	Document Class Fields Change Ratio
Accuracy Character Count	Document Classification Average Confidence
Accuracy Conf. Character Count	Document Classification Change Count
Accuracy Field Count	Document Classification Change Ratio
Accuracy Validated Character Count	Document Review Average Confidence
Accuracy Validated Field Count	Document Review Change Count
Activity Completed Count	Document Review Change Ratio
Activity Completed Review Average Time	Document Review Count
Activity Completed Review Total Time	Job Session Finished Count
Activity Due Count	Productivity Activity Count
Activity Due Max Pending Time	Productivity Avg Time Per Activity
Document Class Field Change Ratio	Productivity Avg Time Per Process
Document Class Field Changes	Productivity Documents Completed
Document Class Field Confidence	Productivity Job Count
Document Class Field Total Number	Productivity Time Spent

The following metrics are deprecated in Kofax Analytics for TotalAgility 1.4.0.

Dashboard	Deprecated views
Documents > Processing	Review by Resource
	Review by Process
	Resource Productivity
	Deleted pages
Documents > Classification	Classification Changes
	Classification vs. Review
	Misclassified and Reclassified
Documents > Extraction	Field Changes
	Field Analysis
	Field Accuracy

The following views are deprecated in Kofax Analytics for TotalAgility 1.4.0.

Note The Filter Field, Classification Group, Extraction Group and Document Type filters do not apply to any deprecated views.

You can enable access to the views by adding view rights to the Kofax Analytics for TotalAgility roles in Insight Admin Console. See the following steps to enable access to views.

- **1.** Log in to Insight Admin Console.
- 2. In the Document Tree, click Roles > role name
- **3.** Click the role in question.
- 4. On the role screen, click the View rights tab.
- 5. Click the KAFTA project in the list.
- 6. Clear (if selected) and select again the "Views" node in the project object tree.
- 7. Click the _deprecated node.
- 8. Check the deprecated views you wish to add to the Kofax Analytics for TotalAgility menus.

Upgrade manually

Before upgrading Kofax Analytics for TotalAgility to 1.4.0, you must upgrade Insight to version 6.0.0.1 or higher.

- 1. Extract KofaxAnalytics-1.4.0_For_TotalAgility.zip. This file contains Project_KAFTA-1.4.0.0 within the Project folder, which is the Insight Kofax Analytics for TotalAgility project that is imported.
- 2. Log in to the Insight Admin Console.
- If you have not run Kofax Analytics for TotalAgility 1.4.0 on Insight 6.0.0.1 or higher, a pop-up appears confirming the database update. Click Yes when prompted to upgrade the current project. The meta and data databases are updated to the current version.
- 4. Open Admin Console > Documents Tree > Projects > KAFTA.

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ه User mapping		Provider name	Database Name	Password		
✓ Roles	>	Sql server Provider	▼ KAFTA_meta	******		
♥ User filters	>			Windows Authentication		
√ Filter group		Change				
△ Alerts	>	File Parser Option				
♥ Distribution						
Calendars		Root directory				
- Map-Aggregate	>	Comple directory				
🗐 Logs		C:\Temp				
& Options						
₿ License manager		Database Option				
		Max database name length				
🕮 SQL FUNCTIONS		Oracle (30)			3	-

5. Click Change.

6. To import the Kofax Analytics for TotalAgility 1.4.0 project, click the **Import from file** tab and in the Data section, clear the check box for **Use Staging DB**.

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🛜 Meta				
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- 7. Click the ellipsis button and select **Project_KAFTA-1.4.0.0** within the Project folder extracted earlier from **KofaxAnalytics-1.4.0_For_TotalAgility.zip**.
- 8. Click **Connect** to ensure that the project Meta and Data database connection parameters are correct.
- 9. Click OK.
- **10.** Click **Yes** for confirmation.

This action creates a new database if a database does not exist; otherwise, it updates the existing database.

11. A message is displayed to inform that the data was imported successfully. The page is refreshed automatically, if it does not refresh, click **OK** and then click **Yes** if you are prompted to refresh the page.

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12. To ensure that the connections to databases are correct, open Admin Console > Documents Tree > Projects > KAFTA.

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✤ Distribution		Remove from the n	nodel: Selected tables All tables			
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😤 Map-Aggregate	>					

13. Manually restore the credentials in the fields for ReportingDB, TotalAgilityDB, and TotalAgilityFinishedDB and ensure that the connections are correct.

14. Open the Admin Console > Documents Tree > Connections > TotalAgility and manually restore the connections to TotalAgility database.

Note If a connection to TotalAgility exists from a previous version of Kofax Analytics for TotalAgility, delete it and configure the new connection (TotalAgility) created by KAFTA 1.4.

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License manager							
🗐 SQL Functions							

- 15. Log out of Admin Console.
- **16.** After upgrading to Kofax Analytics for TotalAgility 1.4.0, you must run the One Time Plan from Beginning of times to Current time. This is required to load global data such as resource names, SLA levels and so on.

Run the SQL Script

After upgrading to Kofax Analytics for TotalAgility 1.4.0, run the <code>Upgrade_Data_Fix.sql</code> script to fix issues with the historical data. The script is available from the InstallTools folder in KofaxAnalytics-1.4.0_For_TotalAgility.zip.

If you do not run the script after upgrading to Kofax Analytics for TotalAgility 1.4.0, the following issues may occur:

- The classification and extraction confidence for deprecated views show as * 100 (for example, 9200% instead of 92%).
- The Capture Only filter does not work on existing activities.
- The Activity Type column was is not available for the existing activities.
- · The Process filter does not work on deprecated classification views.
- It is not possible to set the date from which the new mapping will be performed.

Upgrade in silent mode

After you extract KofaxAnalytics-1.4.0_For_TotalAgility.zip, the silent upgrade installer and upgrade instructions, SilentUpgrade.zip and readme.txt, are available from the InstallTools folder. Use "SilentUpgrade.zip" to upgrade silently. Refer to "readme.txt" in the Kofax Analytics for TotalAgility package for instructions.

Note After performing a silent upgrade to Kofax Analytics for TotalAgility 1.4, refer to the Run the SQL Script section if required.