Analytics for Kofax AP Agility

Installation Guide

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KOFAX

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Preface

This guide includes instructions for installing, configuring, administering, and using Analytics for Kofax AP Agility.

Read this guide completely before using the software. The guide is written with the assumption that you have a basic understanding of Kofax TotalAgility, Kofax Insight, and Kofax AP Agility.

Related documentation

The product documentation set for Analytics for Kofax AP Agility is available at the following location.

https://docshield.kofax.com/Portal/Products/APAgility/2.3.0-2jf4h43rcd/APAgility.htm

In addition to this guide, see the documentation for the following products for additional installation and configuration information.

Kofax Insight Documentation

Refer to the Kofax Insight guides for installation and administrator information. Online help is available from the Admin Console, Insight Studio, Themes and Formats, and Data Loader applications.

Help for Analytics for AP Agility

Contains information about Analytics for AP Agility and how to use its features.

Help for Kofax AP Agility Configuration

Contains information necessary for configuring Kofax AP Agility to work for your specific needs.

Kofax AP Agility Release Notes

Late-breaking product information is available from the release notes. The release notes contain information that may not be included in the *Analytics for Kofax AP Agility Administrator's Guide*. Release notes are also available for each of your installed Kofax applications. Locate release notes on the Kofax support site at www.kofax.com/support.

Getting help for Kofax products

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

To access the Kofax Knowledge Base, go to the Kofax website and select **Support** on the home page.

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

The Kofax Knowledge Base 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.

  Scroll through the Kofax Knowledge Base home page to locate a product family. Then click a product family name to view a list of related articles. Please note that some product families require a valid Kofax Portal login to view related articles.
- Access to the Kofax Customer Portal (for eligible customers).

  Click the **Customer Support** link at the top of the page, and then click **Log in to the Customer Portal**.
- Access to the Kofax Partner Portal (for eligible partners).

  Click the **Partner Support** link at the top of the page, and then click **Log in to the Partner Portal**.
- Access to Kofax support commitments, lifecycle policies, electronic fulfillment details, and self-service tools.

  Scroll to the **General Support** section, click **Support Details**, and then select the appropriate tab.

Chapter 1

Introduction

Analytics for AP Agility is an extension of Kofax AP Agility that produces a graphical business intelligence dashboard based on near real-time data collected during the document processing workflow. Analytics for AP Agility presents financial processes data in graphical and interactive views.

Built on Kofax Insight, Analytics for AP Agility is a browser based product. Kofax Insight is a process intelligence platform that monitors, analyzes and helps optimize your operational business activities to ensure compliance, eliminate risk and provide insight and visualization of all information.

With Analytics for AP Agility you can:

- Prioritize daily activities
- Review invoice summary data
- Take action to meet key performance indicators
- Review invoice detailed information and status
- Optimize cash resources

System requirements

Most software requirements for Analytics for AP Agility, including the supported versions of Kofax AP Agility and Kofax Insight, are listed in the *Kofax AP Agility Technical Specifications* document on the Kofax website at www.kofax.com. Review it carefully before installing your product, and verify that you have applied the most current service packs or fix packs listed in the document. Also, be sure to read the Service Pack or Fix Pack documentation (Release Notes or ReadMe files), as applicable.

Chapter 2

Install Analytics for AP Agility

This chapter explains how to install Analytics for AP Agility.

Before you begin, make sure you have installed the following Kofax products:

- Kofax TotalAgility
- Kofax Insight
- Kofax AP Agility

Note If you are installing Analytics for AP Agility in an Azure environment, follow these procedures only.

- Configure Kofax AP Agility resources
- Configure Kofax AP Agility navigation menu

Skip the other procedures in this chapter.

Create the Analytics for AP Agility Insight project

This section assumes that you have already installed and configured Kofax Insight. See the *Kofax Insight Installation Guide* for details.

Use this procedure to import the Insight project that contains built-in views, records, and metrics for Analytics for AP Agility.

1. Extract all files from `KofaxAnalyticsAPAgility-2.3.0.ZIP`.
2. From the Windows Start menu, run **Setup Analytics Project** and enter the login credentials for Administrator.

   The default administrator login credentials are:

   - Login name: Administrator
   - Password: The password you entered during the Kofax Insight installation.

   Note If you did not install the Insight license, a prompt to download the license appears. Import the license file provided by your Kofax representative.

3. Click **Create new project** and enter a project name, such as <APA_ANALYTICS>.

4. Set the database connection information for the Analytics for AP Agility Meta and Data databases.
   - Database type: MS SQL Server
   - Provider name: SQL server Provider is the default value
   - Server Name
   - User Name
   - Database Name
   - Password

   Important If you are planning to create the Meta and Data databases automatically, you cannot click **Test Connection** at this point because the connection fails. This is because the database is not yet available.

   For the User Name and Password, specify the credentials of a user that is a member of the following groups or those with similar privileges:
   - db_datareader
   - db_datawriter
   - db_ddladmin

   Note The database administrator should also create SQL users to connect with the Meta and Data databases that are members of db_creator or with similar privileges to create databases. This enables Insight to create Meta and Data databases automatically with no additional assignment of rights required. See the *Kofax Insight Installation Guide* for instructions.

5. Click **OK**.
   Upon successful completion, the <APA_ANALYTICS> project is added to the projects list.
6. Select the project you just created and click the ellipsis button next to the **Select a Kofax Analytics Project file** field to browse the bundle.
7. Select **File is located on the client computer and will be copied to the server for processing** and click **OK**.
8. To add the built-in views, records, and metrics for Analytics for AP Agility, navigate to `<distribution_directory>\Analytics_BI\BI_Bundle.zip`, click **Open**, and then click **NEXT**.
   In the path above, `<distribution_directory>` is the location where you downloaded and extracted the installation package.
9. When the project upload is finished, set the following information for the Kofax TotalAgility schema when prompted.
   - Database type: MS SQL Server
   - Provider name: SQL server Provider is the default value
   - Server Name: The Server that hosts the SQL Server running the Kofax TotalAgility database
   - User Name
   - Database Name: The Kofax TotalAgility database name
   - Password

   For the User Name and Password, specify the credentials of a user that has access to the Kofax TotalAgility schema and be a member of the db_datareader group or have similar privileges.

The user must also have rights to execute the `IsUserInsight` and `IsUserInsightAdmin` procedures.

10. Click **Connect** to test the connection.
    The circular indicator turns green if the connection is successful.
11. Click **NEXT**.
12. Set the following information for the Kofax AP Agility schema:
    - Database type: MS SQL Server
    - Provider name: SQL server Provider is the default value
    - Server Name: The server that hosts the SQL server running the Kofax AP Agility database
    - User Name
    - Database Name: The Kofax AP Agility database name
    - Password

    For the User Name and Password, specify the credentials of a user that has access to the Kofax AP Agility schema and be a member of the db_datareader group or have similar privileges. Do not modify any other schema settings.
13. Click **Connect** to test the connection.
    The circular indicator turns green if the connection is successful.
14. Click **NEXT**.
    A message indicates that the project was successfully created.
15. Click **FINISH**.

Configure remote services in Kofax Insight

If you are using Actionable Analytics, that is manual Analytics Actions (Escalate, Increase Priority, Reassign from Invoice Search view of Analytics), configure Kofax Insight to use the Kofax TotalAgility Web Service. Follow these steps:

1. Start Insight Studio from the following URL:
   `http(s)://<server>/Insight/Studio/`, where `<server>` is the Insight Web Server host name.

   When prompted, enter the login credentials for an Insight administrator.
2. In the **Documents Tree**, select the `<APA_ANALYTICS>` project.
3. On the list of objects, expand **Remote Services** and open **Kofax TotalAgility Web Service**.
4. Specify the URL of the service, such as:
   `http(s)://<server>/TotalAgility/Services/Sdk/JobService.svc`, where `<server>` is the Kofax TotalAgility Web Server host name.
5. Select the type of authentication as defined during Kofax TotalAgility Web Server installation:
   - If Kofax TotalAgility uses Windows Authentication, select the **Use windows authentication** option only.
   - If Kofax TotalAgility uses Basic Authentication, select the **Basic authentication** option only and enter the credentials of a Kofax TotalAgility administrator.
   - If Kofax TotalAgility uses Anonymous Authentication, leave both options unselected.

6. Leave these settings at their defaults:
   - Request type: POST
   - Data type: JSON
7. Click **Save**.

Configure the integration between Kofax TotalAgility and Kofax Insight

You can skip this section if you already have the integration between Kofax TotalAgility and Kofax Insight.

1. Start **TotalAgility Designer**.
2. From the navigation pane, select **Integration** > **Insight** and select .
   The **Insight** page is displayed.
3. Click **New**.
   The **New Insight Configuration** page is displayed.
4. On the **New Insight Configuration** page, specify the following:
   a. For the **Server URL** field, enter `http(s)://<server>` where `<server>` is the Insight Web Server host name.
   b. For the **Username**, enter `Administrator`.
   c. For the **Password**, enter the Administrator password.
   d. Click **Save**

   The new Insight configuration is saved.
5. When prompted, refresh the page.
6. When the web page reloads, the configured URL listed on the Insight page.

Configure Kofax AP Agility resources

To configure your Kofax AP Agility menu to access Analytics for AP Agility from Kofax AP Agility, you can add Kofax AP Agility groups to Insight Users group by following these steps..

1. If you are not already logged in, log in to the **TotalAgility Designer**.
2. On the navigation pane, select page, click **Resources** > **Groups**.
   The **Resources** list includes the Insight Admin and Insight Users groups that are created automatically. You do not need to create a Kofax TotalAgility resource or group within TotalAgility.
   The **Resources and groups** is displayed with the **Insight Admin** group and the **Insight Users** group.

3. Add members to the **Insight Admin** group:
   a. Select the **Insight Admin** group from the list of resources and groups.
      The **Edit group resource** page is displayed.
   b. Beside the **Group members** text area, click **Add**.
      The **Add group members** page is displayed.
   c. Select the **Groups** tab.
   d. Select the **AP Agility** category.
   e. Click on each resource that you are granting Administration rights. The clicked groups are added to the **Selected items** field below.
      We recommend that you add the APA Administrators group.
   f. When you are finished adding members, click **Done**.

   You are returned to the **Edit group resource** page where the list of selected groups is now visible in the **Group members** field.
4. Click **Save**.
   A message is displayed indicating a successful save and you are returned to the list of **Resources and groups**.
5. Add members to the **Insight Users** group:
   a. Select the **Insight Users** group from the list of resources and groups.
      The **Edit group resource** page is displayed.
   b. Beside the **Group members** text area, click **Add**.
      The **Add group members** page is displayed.
   c. Select the **Groups** tab.
   d. Select the **AP Agility** category.
   e. In the **Groups** section, click on each resource that you are adding to **Insight Users** group. The clicked groups are added to the **Selected items** field below.
      It is recommended that you add a manager group and drag that group rather than individual users.
   f. When you are finished adding members, click **Done**.

   You are returned to the **Edit group resource** page where the list of selected groups is now visible in the **Group members** field.
6. Click **Save**.
   A message is displayed indicating a successful save and you are returned to the list of **Resources and groups**.

Configure Kofax AP Agility navigation menu

You must be a member of the Designer group in TotalAgility to configure Kofax AP Agility and Analytics for AP Agility to access Insight.

1. Open the **TotalAgility Designer**.

2. From the navigation pane, select **User interface** > **Navigations**.
3. Select the **AP Agility** category and then select the **AP Agility Menu**.
4. To add a new menu item, click # for the **AP Agility Menu** item.
5. Enter **Menu Item Name**, such as Analytics.
6. In the **Redirect** section, select **Insight** for **Type**.
7. In the **Target** field, select the **Analytics Main** view as your default view in the **Target** field.

   Note If you are unable to select the Analytics Main view, ensure the user name and password for the Administrator user are correctly set in TotalAgility. On the TotalAgility Designer navigation, click **Integration** > **Insight**.

8. In the **Access Permissions** section, select **Deny Everyone Except** for **Access**.
9. In the **Access Permissions** section, click **Add**.
10. Select **Group**.
11. Select the **Default Category** and then select the **Insight Users** group.
12. Click **Done**.
13. Repeat steps 4–12 to add the **Invoice Search** menu item using **Analytics Main - Search** as the default view in the **Target** field.

Configure the Kofax Insight cookieless setting

Before you proceed, locate these web.config files in `<Insight_installation_directory>/Insight` and perform the following steps for each one:

- `Admin/web.config`
- `DataLoad/web.config`
- `reporthtml/web.config`
- `Studio/web.config`
- `Themes/web.config`
- `View/web.config`

1. Back up the web.config file.
2. Open web.config for editing:
   a. Locate the following string:
      `<sessionState cookieless="AutoDetect" />`
      If you do not have the cookieless attribute, add it to sessionState.
   b. Set the value to false as follows:
      `<sessionState cookieless="false" />`

Logging for Kofax Insight

To enable logging for Kofax Insight WCF Service which can provide additional underlying information, take the following steps:

1. In Insight Server, navigate to `<Insight_installation_directory>\WcfDataService`.
2. Back up the web.config file.
3. Open web.config for editing:
   a. Locate the line containing:
      `Insight.DataProcessing.Readers.IsLoggingEnabled`
   b. Set the value to TRUE.
      To disable logging, set the value to FALSE.

   You do not need to restart the Kofax Insight WCF Service for the changes to take effect.

Chapter 3

Upgrade Analytics for Kofax AP Agility

If you have installed Analytics for AP Agility 2.1.0 alongside Kofax AP Agility 2.1.0, or Analytics for AP Agility 2.2.0 alongside Kofax AP Agility 2.2.0, it is necessary to perform the following steps.

1. Upgrade Kofax AP Agility to 2.3.0.
   For more information on upgrading Kofax AP Agility, refer to the *Kofax AP Agility Installation Guide*.
2. Upgrade Analytics for AP Agility 2.1.0 or Analytics for AP Agility 2.2.0 to Analytics for AP Agility 2.3.0.
   To upgrade Analytics for AP Agility perform the following steps.
   a. Upgrade Analytics for Kofax AP Agility project database version
   b. Delete all data before upgrade
   c. Upgrade the Analytics for Kofax AP Agility project
   d. Load historic data and configure data load frequency
   e. Configure Kofax AP Agility navigation menu

Upgrade Analytics for Kofax AP Agility project database version

If you are upgrading from Analytics for AP Agility 2.1.0, it is necessary to upgrade the version of the project database. Skip these steps if you are upgrading from a later Analytics for AP Agility version.

You can upgrade the project database used by Analytics for Kofax AP Agility by following these steps.

1. Open a Web Browser, start the Insight Studio, and enter your Administrator logon details.
   For example, use a URL similar to `https://<server>/Insight/Studio/` where `<server>` is the Insight Web Server hostname.
2. The **Update confirmation** window is displayed automatically.
3. Click **Yes**.
   The upgrade process begins.
4. After the upgrade is successful, log out from the Insight Studio.
   The **Insight Guide** page is displayed after a successful upgrade.

Delete all data before upgrade

This part of the upgrade process removes all Kofax AP Agility data from Kofax Insight. This ensures that the existing data does not interfere or influence the data collected after the upgrade.

You can delete all data by following these steps..

1. Open a Web Browser, start the Insight Data Loader, and enter your Administrator logon details.
   For example, use a URL similar to `https://<server>/Insight/Dataload/` where `<server>` is the Insight Web Server hostname.
2. Ensure that there are no scheduled execution plans, and that all other plans are stopped.
3. On the list of **Execution Plans**, click **Load** for **Delete All Data**.
   The **<APA_ANALYTICS_2.X> - Delete All Data** tab is displayed.
   Where X is either 1 or 2, representing the installed Analytics for Kofax AP Agility version.
4. On the **<APA_ANALYTICS_2.X> - Delete All Data** tab, in the **Date range** section, select **Beginning of times (1/1/1900 12:00 AM)** and **Future (1/1/3000 12:00 AM)**.
5. In the left pane, select **Records**, **Metrics**, and **Translation Tables**.
6. Click **Delete data**.
7. When prompted to confirm the deletion of all historical data, click **Yes**.
   After data is deleted you are notified of a successful deletion. Click **OK**.
8. Optionally, return to the list of **Execution Plans**.

Upgrade the Analytics for Kofax AP Agility project

You can upgrade the Kofax Insight project that contains built-in view, records, and metrics for Analytics for Kofax AP Agility by following these steps.

1. Extract the `KofaxAnalyticsAPAgility-2.3.0.ZIP` file.
2. Run the **Setup Analytics Project**.
   Enter the login details for the Administrator
3. Select **Update the existing project**.
   A list of projects is displayed.
4. From the list of projects to upgrade, select **<APA_ANALYTICS_2.X>**.
   Where X is either 1 or 2, representing the installed Analytics for Kofax AP Agility version.
5. Click the ellipsis button next to the **Select a Kofax Analytics Project file** field to browse the bundle.
6. In the new window, select **File is located on the client computer and will be copied to the server for processing**. Click **OK**.
7. To upgrade the built-in view, records, and metrics for Analytics for Kofax AP Agility, navigate to `<distribution_directory>\ Analytics_BI\BI_Bundle.zip` and click **Open**.
   In the path above, the `<distribution_directory>` is the location where you downloaded and extracted the installation package.
8. When the file upload is successful, click **NEXT** and then confirm the start of the data import.
   The import of the solution is started.
9. After the project is successfully uploaded, verify the **Connection Options** for the Kofax TotalAgility schema.
10. Click **Connect** to test the connection.
    The circular indicator turns green if the connection is successful.
11. Click **NEXT**.

12. Verify the **Connection Options** for the Kofax AP Agility schema.
13. Click **Connect** to test the connection.
    The circular indicator turns green if the connection is successful.
14. Click **NEXT**.
    A message indicates that the project was successfully updated.
15. Click **FINISH**.
    The Analytics for Kofax AP Agility project upgrade is now complete.

Load historic data and configure data load frequency

For data that you will create in Kofax AP Agility 2.3.0, it is necessary to configure the load of data using the Main Data Load plan.

In addition to this, you can optionally run the Update Source Data to 2.3 plan to load data from the previously installed version. If you do perform the Update Source Data to 2.3 plan, this must be executed before the first execution of the **Main Data Load** plan.

You can load historic data and configure the data load frequency by following these steps.

1. Open a Web Browser and start the Insight Data Loader and enter your Administrator logon details.
   For example, use a URL similar to `https://<server>/Insight/Dataload/` where `<server>` is the Insight Web Server hostname.
2. Optionally, if you want to load the data from the previous version of Kofax AP Agility, perform the following steps.
   a. On the list of **Execution Plans** click **Load** for the **Update Source Data to 2.3** plan.
   b. In the **Date range** section, set the following settings
      - Set the **From date** to **Beginning of times (1/1/1900 12:00 AM)**.
      - Set the **To date** to **Future (1/1/3000 12:00 AM)**.
   c. Click **Load data**.
   d. After the data load is successful, return to the list of **Execution Plans**.
3. On the list of **Execution Plans** click **Load** for the **Main Data Load** plan.
4. In the **Date range** section, set the following settings.
   a. Set the **From date** to **Beginning of times (1/1/1900 12:00 AM)**.
   b. Set the **To date** to **Current time**.
   c. Select **Save "To date"** as the date of the last successful load.

   Note If you do not need to load all of your data, use the **Specific date** option to see the appropriate time interval. This is because larger data amounts can result in slower load times.
5. Click **Load data**.
6. After the data load is successful, return to the list of **Execution Plans**.

7. Configure the data load frequency as follows.
   a. On the list of plans, click the ellipsis button in the **Frequency** column for the **Main Data Load** execution plan.
   b. Configure the data load frequency.
      For example, select **Every day, at specific times**.
      Use the **Add** and **Remove** icons to set up the execution time schedule.
      Alternatively, you can select the **Every** option. Set the value to 5 minutes if you want to view near real-time data.
   c. Use the **From** and **To** date options to specify the data load interval.
8. Click **OK** to save your changes and close the window.
9. Configure the Kofax AP Agility navigation pane.

Chapter 4

System configuration

This chapter gives you information about administration tasks and settings needed to maintain and optimize Analytics for AP Agility performance.

User authorization in Analytics for AP Agility

The Analytics for AP Agility viewer user is the same as the Kofax AP Agility user.

Verify that a user is added to the Insight Users group of the Default category.

Also, after a user is added to Kofax AP Agility, verify that the viewer user follows the procedures in this section to ensure that data appears in the Analytics for AP Agility viewer as expected.

1. To access Analytics for AP Agility, open the Kofax AP Agility site.
2. Log in to Kofax AP Agility using the AP Agility user name and password.
3. Click the **Analytics** menu item.

Configure the data load schedule

Use the procedure to run the execution plan.

1. To start **Insight Data Loader**, open a Web Browser and enter the URL address such as: `http(s)://<server>/Insight/Dataload/` where `<server>` is the Insight Web Server host name.

   Enter the login credentials for Administrator.
2. On the list of plans, click **Load** for **Main Data Load**.
   a. In the **Date range** section, select **Beginning of times** to **Current time**.

   Note If you do not need to load all your data, use the **"Specific date"** option to set the appropriate time interval. Depending on the data amount, loading can take a long time.

   b. Select **Save "To date" as the date of last successful load** and click **Load data**.
   c. After the data for the Main Data Load plan is loaded successfully, return to the list of plans.

Configure the data load frequency

1. On the list of plans, click the ellipsis button in the **Frequency** column for the selected execution plan (Main Data Load).

2. Configure the data load frequency.
   For example, select the **Every day, at specific times** option. Use Add and Remove icons to set up the execution time schedule.
   Alternatively, you may select the **Every** option. Set the value to 5 minutes if you want to view near real-time data.
3. Use the **From date** and **To date** sections to specify the data load interval.
4. Click **OK** to confirm your selection and close the window.

Configure delete data threshold

Use the delete data threshold to remove all unnecessary data from the Analytics for AP Agility views or to delete all data before the configured date. The default value is 1/1/2015.

You can configure when data is deleted by following these steps.

1. To start **Insight Studio**, open a Web Browser and enter the URL address such as:
   `http(s)://<server>/Insight/Studio/` where `<server>` is the Insight Web Server host name.
   Enter the login credentials for Administrator.
2. On the list of objects, expand **Translation Tables** and select **Delete Data Threshold**.
3. In the **Value** column, enter the date.
   All data before this date will be removed from Analytics for AP Agility.
4. Click the save icon on the toolbar to save changes.

Start delete data threshold

After you have configured the Delete Data Threshold, it is still necessary to start the plan. If you do not start the plan, the data is not removed.

You can start the Delete Data by Threshold plan by following these steps.

1. To start **Insight Data Loader**, open a Web Browser and enter the URL address such as:
   `http(s)://<server>/Insight/Dataload/` where `<server>` is the Insight Web Server host name.
   Enter the login credentials for Administrator.
2. On the list of plans click **Load** for the **Delete Data by Threshold** plan.
   You do not need to provide dates or ranges for this execution plan.
3. Click **Load Data**.
   Once the plan has completed successfully, return to the list of plans.