Kofax Analytics for ControlSuite
Administrator's Guide

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Preface

This guide provides instructions for administrators who are responsible for installing and using Kofax Analytics for ControlSuite. Use this guide to get started with the software and become familiar with the product features. This guide is written with the assumption that you have a basic understanding of Kofax ControlSuite and Kofax Equitrac, along with Kofax Insight.

Related documentation

Product documentation for Kofax ControlSuite, which includes Kofax Equitrac, is available online:

https://docshield.kofax.com/Portal/Products/ControlSuite/1.3.0-wz4krwhe7f/ControlSuite.htm

Product documentation for Kofax Insight 6.2.1 is available here:

https://docshield.kofax.com/Portal/Products/Insight/6.2.1-awvkgyq48h/Insight.htm

Training

Kofax offers both classroom and online training to help you make the most of your product. To learn more about training courses and schedules, visit the Kofax Education Portal on the Kofax website.

Getting help with 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.

> 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

Kofax Analytics for ControlSuite consists of dashboard views that give you insights into user and document activities based on Kofax Equitrac data sources. These views are designed to reflect the use of devices, accounts and all other activities related to document printing.

This guide details instructions on how to install and use Kofax Analytics for ControlSuite. It also provides a description of the views included in your Kofax Analytics for ControlSuite installation. These views help you track data through the workflow, analyze the effectiveness of the processes and resources, and address business problems. They include a variety of visual and analytical representations of data using charts, grids, pivot tables, and reports. System administrators, business process managers, and other stakeholders can use these views to gain visibility into analytical information.

Kofax Analytics for ControlSuite views are based on values from predefined Kofax records and metrics. When using the Dashboard Designer within Insight Studio to add custom views, do not modify the predefined views, records, or metrics that come with the product. Instead, you can make a copy of existing views and then customize the settings. With this approach, you can ensure that customizations are retained as product updates are applied in the future.

Kofax Analytics for ControlSuite works in a Kofax Insight environment. Therefore, this guide also includes Kofax Insight configuration information as necessary, to ensure that Kofax Analytics for ControlSuite dashboard views function properly.

Dashboard overview

The core elements of the Kofax Analytics for ControlSuite are dashboard views. They are used to visually illustrate document activities that occur throughout the Kofax Equitrac system. Kofax Analytics views are built primarily from interactive graphs and tables that allow the administrator to filter the report time and activity types.

Kofax Analytics for ControlSuite views:

- Landing page
- Account Adjustment
- Account Listing
  - Billing Code Account Listing
  - Department Account Listing
  - User Account Listing
  - Vending Account Listing
- Department Activity

- Department Expense
- User Activity
- User Expense
- Activity by Application
- Device Faults
- Savings
- Detailed Activity by Account
- Detailed Activity by Device
- Summary Activity by Account
  - Billing Code Account
  - Department Account
  - Network User
  - Network User and Device
  - Organization Account
  - User Account
- Summary Activity by Device
- Average Activity by Time
- Device Activity
- Savings Report Metrics

Chapter 2

Requirements

Before you install Kofax Analytics for ControlSuite, ensure your system meets the software and database requirements listed in this chapter.

> The instructions in this guide are written with the assumption that you are working with a current version of the Windows 64-bit operating system.

Software requirements

Before using Kofax Analytics for ControlSuite, you must successfully install and activate the licenses for the following products:

- Kofax ControlSuite 1.2 or higher (See the Kofax ControlSuite Help to install ControlSuite).
- Kofax Insight 6.2.1.5 or higher (See Install Kofax Analytics for ControlSuite for Insight installation options).

IIS web server

Before installing Insight, verify that Internet Information Server (IIS) is enabled and configured. While IIS is provided with all Windows servers, it is not installed by default; you must ensure that the installation is complete.

> When you configure Insight manually on IIS, the application pool (default or custom) must be .NET v4.x. For **Managed pipeline mode**, select **Integrated**.
>
> When using a custom application pool, you must have a dedicated application pool that contains the ChartSnapshotService. If you use an Active Directory account for an application pool, it must have the same level of permissions as the NetworkService. We recommend that you set the idle timeout to zero for the application pool, so that it always remains active.

Configure IIS

1. Using Control Panel, navigate to **Administrative Tools** > **Server Manager**.
2. In Server Manager, under **Features Summary**, click **Add Features**.
3. In the **Add Features** window, under **.NET Framework Features**, select the most current .NET Framework version.
4. In the **Add Features** window, under **.NET Framework <version> Features-WCF Activation,** select **HTTP Activation**.
5. Click **Next**.
6. In Server Manager, under **Roles Summary**, click **Web Server (IIS)**.

7. In the Web Server (IIS) management window, click **Add Role Services**.
8. In the **Add Role Services** window, expand **Web Server and Application Development**.
9. Select **ASP.NET** and click **Next** to start the installation.

For IIS 10 on Windows Server 2016 or higher, when you add Role Services for the server, select all the features related to the IIS Web Server. Later, when IIS is installed, you may remove all unnecessary features.

Configure IIS for Windows 7 or higher

1. Using Control Panel, navigate to **Programs** > **Programs and Features**.
2. Click **Turn Windows features on or off** and select **Internet Information Services**.
3. Select the required options and click **OK**.

IIS settings

Kofax Insight works with the default settings for IIS 7.5 or higher.

1. Using Control Panel, navigate to **Administrative Tools** > **Server Manager**.
2. In **Server Manager**, select **Add roles and features**.
3. In the **Add roles and features** wizard, under **Server Roles**, select **Web Server (IIS)** and expand the list to select the following options:

Category	Required selections
Common HTTP Features	• Static Content • Default Document • HTTP Errors • HTTP Redirection
Security	• Request Filtering • Basic Authentication • Client Certificate Mapping Authentication • IIS Client Certificate Mapping Authentication • URL Authorization • Windows Authentication
Health and Diagnostics	• HTTP Logging
Performance	• Static Content Compression • Dynamic Content Compression
Management Tools	• IIS Management Console • IIS Management Scripts and Tools • Management Service
Application Development	• .NET Extensibility (use the latest version) • ASP.NET (use the latest version) • ISAPI Extensions

Category	Required selections
	• ISAPI Filters
WCF Services	• HTTP Activation

Databases

Kofax Analytics for ControlSuite is supported for use with a SQL Server database.

You must have a database account with sufficient rights to create the required databases, and to create and modify database tables. Therefore, we recommend that you create databases prior to installing the product. After defining a user with database ownership rights, you can manually create the databases and individually assign the ownership rights to each of them. If the databases are not created beforehand, you cannot assign the database roles to users and need to wait until the installation is completed to do so.

Database collations

The same collation should be used for all Kofax Analytics for ControlSuite and Equitrac databases. If the database collation is not consistent, it may adversely impact the ability to populate dashboard views.

Create Insight databases

Use a new or existing database management system instance to create the three databases (Admin, Data and Metadata) required for use with Kofax Analytics for ControlSuite. We recommend that you use a consistent naming convention for each database as described below:

- Admin database: This database stores Insight administrative data related to users, roles, filtering, alerts, logs, and more. With a new installation, the Admin database must be empty. You can assign a name for this database such as **KAFCS_Admin**.
- Data database: Created by the Kofax Insight Admin Console when importing the KAFCS project file, this database stores the processed records and metrics. You can assign a name for this database such as **KAFCS_Data**.
- Meta database: Created by the Kofax Insight Admin Console when importing the KAFCS project file, this database stores configuration information such as metric definitions and calculation logic. You can assign a name for this database such as **KAFCS_Meta**.

Prepare the databases

1. Log on to SQL Server.
2. Ensure that you have access to use **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, including KAFCS_Admin, KAFCS_Meta and KAFCS_Data.

   If you already have Kofax Insight installed, the Admin database already exists and you do not need to create it in this step.

   > You can also auto-create databases during project creation. See Create a new project for Kofax Analytics for ControlSuite.

4. Create a user.
   a. Navigate to **Security** and right-click.
   b. Select **New** > **Login**.
      The **Login - New** dialog box appears.
   c. Select **SQL Server Authentication**.
   d. Enter a name for the user.
   e. Enter a password for the user.
   f. Select the **User Mapping** property of the new login and grant the **db_owner role** membership to the following databases:
      - KAFCS_Admin
      - KAFCS_Meta
      - KAFCS_Data

      > 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 ControlSuite data source, which requires one Equitrac database name such as *eqcas*.

5. Click **OK**.

Connect to Equitrac database

For initial setup, make sure the Insight Installation Manager has connection and access permissions to the Equitrac database server (ControlSuite server).

Give access to Kofax Analytics for ControlSuite databases

Kofax Analytics for ControlSuite uses Windows authentication by default. Access to all Kofax Analytics for ControlSuite databases must be given to the following:

1. User account used to perform the Kofax Analytics for ControlSuite installation.
2. Account/identity for each IIS application pool.

   Verify where Kofax Insight is installed within each application pool. If different Kofax Analytics for ControlSuite components are installed for multiple users, each account/identity must be configured with the same rights assigned for the other user accounts.
3. Logon account for the Insight Scheduler Service.

   Note that accounts for Windows services must be granted the "Log on as a service" right. Otherwise, the installation will fail to set the logon account.

For more information on Windows authentication settings, refer to Configure Insight for Windows authentication.

Use SSL

Enable SSL (Secure Sockets Layer) communication to secure Kofax Analytics for ControlSuite, allowing successful communication among web services.

> 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 ControlSuite at the time of installation or after the 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 **Edit 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. Double-click **Insight**, and then double-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 specify the same time zone when installing both Kofax Insight and Kofax ControlSuite, including Kofax Equitrac. If the same time zone is not specified for the Equitrac databases, Insight database, and Insight servers, it is likely that the data will be unavailable and the dashboard views will be empty.

Chapter 3

Install Kofax Analytics for ControlSuite

Kofax Analytics for ControlSuite works in a Kofax Insight environment. Therefore, the installation of Kofax Analytics for ControlSuite also requires Kofax Insight installation.

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

- Silent installation
- Standard installation

Perform a silent installation

Use the silent installation method to automate the process of installing Kofax Analytics for ControlSuite. When you install Kofax Analytics for ControlSuite in silent mode, it also installs Kofax Insight. Use this method only if you are performing a new Kofax Insight 6.2.1 installation.

Silent installation supports two types of Kofax Insight Server installations:

- All in One: Use the Setup_AllInOne.bat file to install the product.
- Three-tier architecture: Use the Setup_AppServer.bat and Setup_WebServer.bat file to install the product.

⚠ The Kofax Analytics for ControlSuite installation fails if Kofax Insight is installed on the same website where the Equitrac Web Client already exists. If you intend to install Kofax Analytics for ControlSuite on a ControlSuite server, make sure to specify a website that differs from the one used for Equitrac Web Client.

Use All In One installation method

We recommend that you use the All In One installation method to perform a silent installation if you do not require the three-tier architecture method.

1. Extract the contents of KofaxAnalytics-1.0.0_For_ControlSuite.zip.
2. Open the **InstallTools** folder.
3. Extract the contents of SilentInstall.zip.
4. Follow the instructions in readme_AllInOne.txt.

Use three-tier architecture installation method

Use the three-tier installation method only if you want to deploy Kofax Insight in a three-tier architecture. For further information, see the *Kofax Insight Technical Architecture and High Availability Setup Guide* from the Kofax Insight 6.2.1 Product Documentation page.

1. Extract the contents of KofaxAnalytics-1.0.0_For_ControlSuite.zip.
2. Open the **InstallTools** folder.
3. Extract the contents of SilentInstall.zip.
4. Follow the instructions in readme_appserver.txt and readme_webserver.txt.

Perform a standard installation

Use the standard installation method to install or upgrade Kofax Insight, and then set up Insight to work in a Kofax Analytics for ControlSuite environment.

The standard installation method consists of the following steps:

1. Install or upgrade Kofax Insight.
2. Activate Kofax Insight license.
3. Create a new project for Kofax Analytics for ControlSuite.
4. Configure Equitrac database for the project.
5. Load data.

The standard method requires the following files:

- KofaxInsightSetup installer including:
  - KofaxInsightSetup_6.2.1.0.0.1827_x64.msi or higher
  - KofaxInsight_6.2.1.5.0.1863_x64.msp

  You can download the files from the Kofax Fulfillment site or obtain a link from your Kofax representative.
- Project_KAFCS-1.0.0.0.zip: This file is provided within the **Project** folder in the KofaxAnalytics-1.0.0_For_ControlSuite.zip file. Do not extract Project_KAFCS-1.0.0.zip, which must be imported during the installation process to enable your Kofax Analytics for ControlSuite dashboard views.

Install or upgrade Kofax Insight

1. Before proceeding, verify that you have created databases based on the guidelines in Databases.
2. Ensure that Kofax Insight is installed on your computer.
   - If you do not have Kofax Insight installed yet or if you have an earlier version of Kofax Insight 6.2.1, run the following files in the order they are listed:
     a. KofaxInsightSetup_6.2.1.0.0.1827_x64.msi

   b. KofaxInsight_6.2.1.5.0.1863_x64.msp

   See the *Kofax Insight Installation Guide* for detailed installation and upgrade instructions.
- If you already have Kofax Insight 6.2.1.0.0.1827 or later installed, run KofaxInsight_6.2.1.5.0.1863_x64.msp to update it with additional settings that are required to support Kofax Analytics for ControlSuite.

3. Confirm that your Kofax Insight installation has successfully completed.

Activate Kofax Insight license

Verify that you have the Kofax Insight license file provided at the time of your product purchase, and then use Admin Console to activate it. When upgrading Kofax Insight from a previous release, a new license is not required and you can skip this step.

1. Copy the Kofax Insight license file to a location that is accessible from your Insight installation.
2. Navigate to **Start** > **All Programs** > **Insight 6.x.x** > **Admin Console**.
3. Enter the Admin Console login credentials.
4. In the **Documents Tree**, select **License manager**.
5. In the right pane, click **Add new data**.
6. Navigate to the license file, select it, and then click **Open**.
   The license is added to the License Manager list, and the Components section displays the components provided with the license.
   The **Documents Tree** is refreshed.

Create a new project for Kofax Analytics for ControlSuite

You must create a new Insight project for use with Kofax Analytics for ControlSuite.

Before proceeding, extract the contents of KofaxAnalytics-1.0.0_For_ControlSuite.zip on the server where Kofax Insight is installed. Make sure you unblock the file from the **File properties** window.

1. Navigate to **Start** > **All Programs** > **Insight 6.x.x** > **Admin Console**.
2. On the **Documents Tree**, right-click **Projects** and select **New**.
3. When prompted, enter the project name (such as KAFCS).
4. In the **Create New Project** window, click the **Import from file** tab.
5. To select the Kofax Analytics for ControlSuite project file, do the following:
   a. Click the ellipsis adjacent to the **Select file** box. The **Open file** window appears.
   b. In the **Open file** window, select either option:
      - **File is located on the client computer and will be copied to the server for processing**: Select **Project_KAFCS-1.0.0.0.zip** from KofaxAnalytics-1.0.0_For_ControlSuite > Project that is already extracted on your local computer.
      - **File is located on the server**: Select a file from the server.

   c. Click **OK**.

6. Enter the server name, database name and the login credentials to access the **KAFCS_Meta** and **KAFCS_Data** databases.
7. Click **Connect** to test if the database connection is working.

   The connection will fail if these databases do not exist.

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

   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 Equitrac database for the project

1. Navigate to Insight **Admin Console** > **Projects** > **KAFCS**.
2. Click **Projects** > **KAFCS** > **eqcas**.
3. Enter the server name, database name and the login credentials to access the *eqcas* database.
4. Click **Connect** to verify the Equitrac database connection.

   The Insight server and the ControlSuite server (where the Equitrac database resides) may exist in separate locations. Therefore, you must make sure that Kofax Insight and the Equitrac database are well-connected (Kofax Analytics for ControlSuite supports SQL server only).

5. Click **Save**.

Load data

Insight Data Loader provides the One Time Plan, which you can run to ensure that your dashboard views include the proper data.

The One Time Plan must be executed at least once; otherwise, the data might be displayed incorrectly in the Kofax Analytics for ControlSuite landing page.

1. Navigate to **Start** > **All Programs** > **Insight 6.x.x** > **Data Loader**.
2. On the **Execution plans** tab, select the project and an execution plan.

   For example:
   - Project: KAFCS
   - Execution Plan Name: One Time Plan
3. Click **Load**.
4. Under the **Data 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.

> When performing a manual data load, ensure that only the One Time Plan is selected.

Other useful plans:

After installation and during the use of Kofax Analytics for ControlSuite, you can run other plans that are available in Kofax Insight Data Loader to maintain a manageable database.

For more details, refer to Help for Insight Data Loader.

Handle data load

To ensure that you are informed of any data load failures or errors, you can configure Insight to send you an email notification. After receiving a notification, you can load data manually for the corresponding time period.

Configure email alerts in Kofax Analytics for ControlSuite

Ensure that email settings are configured in Kofax 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 appears.
3. In the Search box, enter **email**.
4. Select the **Data load errors email recipient** option from the search result and enter the email address of the person who should be informed when errors occur.
5. Click **OK** to confirm the email address.

Manually load data

If you need to manually load data after an error or failure occurs, follow the instructions in Load data.

Install Fix Pack 1

Fix Pack 1 provides support for Kofax Analytics for ControlSuite to work in an Azure environment, and introduces five new views and minor user interface revisions. For more details, see the ReadMe file included with KofaxAnalyticsForControlSuite-1.0.0.1.zip. You can install Fix Pack 1 to update your Kofax Analytics for ControlSuite 1.0.0 installation with the new features.

Before installing Fix Pack 1, make sure that you already have Kofax Analytics for ControlSuite 1.0.0 installed on your system. For details, see Install Kofax Analytics for ControlSuite.

Download Fix Pack 1 from the Kofax ControlSuite 1.3 package that is available from the Kofax Fulfillment site, and use either of the following methods to install the Fix Pack:

- Use Silent Upgrade script
- Use Insight Admin Console

Use Silent Upgrade script

The procedure in this section explains how to use the silent installation method to add Fix Pack 1 to your Kofax Analytics for ControlSuite 1.0.0 installation. You can also use the procedure to upgrade to Kofax Insight 6.2.1.5 if you are currently working with an earlier version of Insight.

The files required to upgrade Insight are available separately from the Kofax Fulfillment site. You can skip any non-applicable steps related to Insight, as noted in the following procedure.

1. Download KofaxAnalyticsForControlSuite-1.0.0.1.zip, which is available from the ControlSuite 1.3.0 product package on the Kofax Fulfillment site.
2. Copy KofaxAnalyticsForControlSuite-1.0.0.1.zip to a folder on your computer, and then extract the contents of the file.
3. In the folder where you extracted the contents of KofaxAnalyticsForControlSuite-1.0.0.1.zip, open the **InstallTools** folder and extract the contents of SilentUpgrade.zip.
4. Copy the new project file KAFCS.zip to the same folder where you extracted SilentUpgrade.zip.

   This file is available from Project\Project_KAFCS-1.0.0.1.zip.
5. Copy KofaxInsightSetup_6.2.1.0.0.1827_x64.msi to the same folder where you extracted SilentUpgrade.zip.

   Skip this step if Kofax Insight 6.2.1 is already installed.
6. Copy KofaxInsight_6.2.1.5.0.1863_x64.msp or a newer fix pack installation file to the same folder where you extracted SilentUpgrade.zip.

   Skip this step if Kofax Insight 6.2.1.5 or higher is already installed.
7. Use UPGRADE.bat to configure all the installation parameters.

   UPGRADE.bat is a standard Windows batch file with all valid parameters listed at the top.

   The parameters listed below are most likely to be changed.

   If you use special characters to set a parameter in the .bat file, place the parameter value inside the quotation marks. For example, set insightadmin_password= "K>fax@8816*".

   - 03 , 04 and 05 - Insight database connection information.
   - 08 - Login credentials for the Kofax Insight Administrator, including the user name and password.
   - 09 - IIS website port.

     Skip this if 15 is set to **False**.
   - 10 - Use SSL.

     Skip this if 15 is set to **False**.

     If set to **True**, the port number in parameter 09 must be updated to the appropriate SSL port.

8. Continue to specify the following parameters related to Kofax Insight.
   - 11 - IIS website name.
     Skip this if 15 is set to **False**.
   - 12 - IIS website application pool name.
     Skip this if 15 is set to **False**.

     With Windows Authentication, you may decide to update this parameter. This package does not configure the access rights for the account of the application pool to the database. Ensure that the access rights are set up before you proceed with the installation.

   - 14 - Eqcas database connection information.
   - 15 - Upgrade Insight server.
     If the value is set to **True**, the **silent_installpath** in parameter 01 also needs to be set, based on the version of Kofax Insight.
     For example, with Kofax Insight 6.2.1, the path is typically `C:\Program Files\Kofax\Insight 6.2.1\`.
   - 16 - Insight setup file name, such as KofaxInsightSetup_6.2.1.0.0.1827_x64.msi.
     Skip this if 15 is set to **False**.
   - 17 - Upgrade Insight fix patch.
     Set to **True** to apply Insight 6.2.1.5 or a newer fix pack.
   - 18 - Insight setup patch file name, such as KofaxInsight_6.2.1.5.0.1863_x64.msp.
     Skip this if 17 is set to **False**.
9. After configuring all the parameters, run UPGRADE.bat with Administrator privileges.

Use Insight Admin Console

The procedures in this section explain how to use the Insight Admin Console to add Fix Pack 1 to your Kofax Analytics for ControlSuite 1.0.0 installation.

Create a backup copy of the Insight project

1. Start Insight Studio.
2. Select the **Tools** tab, and then click **Export** on the toolbar.
3. On the dialog box that appears, select **Check All**, and then click **Export** to save the project backup.
4. Store the exported .zip file in a backup folder.

Update the Insight project

1. Download KofaxAnalyticsForControlSuite-1.0.0.1.zip, which is available from the ControlSuite 1.3.0 product package on the Kofax Fulfillment site.
2. Start Insight Admin Console.
3. Click the **Projects** icon, and then select the **KAFCS** project name.
4. On the **KAFCS** panel, select **Change**.

5. On the **Update the existing project** window, select **Import from file**.
   a. From the **Import from file** tab, on the **Select file input** row, click the ellipsis button.
   b. When prompted, select **File is located on the client computer and will be copied to the server for processing**, and then click **OK**.
   c. On the **Open** window, navigate to Project_KAFCS-1.0.0.1.zip (provided with Fix Pack 1), and click **Open**.
6. On the **Confirmation** window, click **Yes** to start the import.
   a. Click **OK** to clear the message confirming successful import.
   b. Click **Yes** if you are prompted to refresh the page.
   c. Exit **Admin Console**.
7. Start **Insight Data Loader**, and then select **Execution Plans** to display the plan list.
8. On the plan list, select the row for **One Time Plan**, and click **Load**.
9. In the **Date range** group, set **Beginning of times** to **Current time**, and then click **Load data**.

Chapter 4

Kofax Insight administration

This chapter gives you information about Insight Admin Console settings that affect your Kofax Analytics for ControlSuite installation. Verify or update settings related to your license, authentication, users and roles, and the Kofax ControlSuite database connection to ensure that your Kofax Analytics for ControlSuite views produce the expected results.

To access Insight Admin Console, do one of the following:

- Type this URL in the Address bar of your browser:

  `http[s]://<server>:<port>/Insight/Admin`

  where `<server>` is the name of your Kofax Insight server

  and `<port>` is included in the URL if the port differs from the default for HTTP (80) or HTTPS (443)
- From the Start menu, navigate to **Insight 6.x.x** > **Admin Console**.

If prompted, enter Insight Administrator credentials.

Before working with Kofax Analytics for ControlSuite views, use Admin Console to do the following:

1. Verify your Kofax Analytics for ControlSuite license. See Verify your license.
2. Set authentication preferences for each Insight application. The authentication method for the dashboard Viewer is determined during the installation or upgrade process. See Set authentication method.
3. Configure users and roles. See Manage users and roles.

Verify your license

Use the Insight License Manager to verify your Kofax Analytics for ControlSuite license.

1. Start Insight **Admin Console**.
2. Select **Documents Tree** > **License Manager**.

   The License Manager appears.
3. In the **Licenses** section, confirm that the **Validity Period** is current and that the **Availability** status is **valid**.
4. On the **Actions** toolbar, click **Save**.

Set authentication method

Use this procedure to set the method for authenticating user login credentials for Insight applications. An authentication method for the dashboard Viewer is determined during the installation or upgrade process.

1. Start **Admin Console**.
2. On the **Documents Tree**, click **Authentication**.
3. On the **Application** list, select the Insight application for which you are setting the authentication method. Keep in mind that authentication preferences are set separately for each Insight application.
   - Admin Console
   - Data Loader
   - Studio
   - Themes and Formats
   - View (affects user access to the Kofax Analytics for ControlSuite dashboard Viewer; setting already applied during the installation or upgrade)
4. Set one of the following authentication methods.
   - **No authentication**

     When selected, all users have access to the application selected in the preceding step. Most organizations require an authentication method.

     When selected for the Viewer, all users have access to the dashboard views, and Kofax ControlSuite batch class assignments are not enforced. In this situation, you can copy the "kafcs role" settings to the Default role. Be sure to apply the Kofax Theme and set the default view for the role to Main.
   - **User's logins and passwords are defined within Insight platform. Users are explicitly linked to roles.**

     ⚠ When selected, each user's Insight application login ID must **exactly** match a corresponding user ID in Kofax ControlSuite. Otherwise, data does not display on the dashboard. To create Insight users and assign roles to them, see Create Insight users and Assign a role to users.
   - **User properties are obtained from the environment: Windows**

     With Windows authentication, each user must be a linked user or belong to a linked group in Kofax ControlSuite. Therefore, you do not need to create an Insight user for each dashboard user.

     The **HTTP Request** and **Login panel** options are not supported for use with Kofax Analytics for ControlSuite.

5. If you select Windows authentication in the previous step, select **And then user roles and access rights are determined by comparing these values to**: **Fixed values**.
   The **External database** option is not supported for use with Kofax Analytics for ControlSuite.

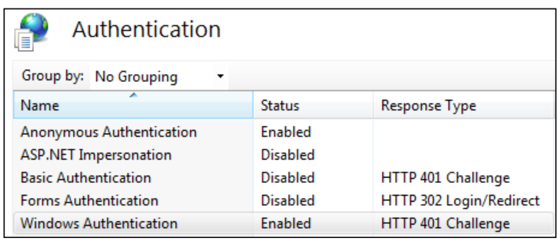
   > ⚠ If you select Windows authentication, follow the procedures in Configure Insight for Windows authentication and Assign a role to users. If you set Windows authentication for Admin Console without completing both of these procedures, you cannot log in to the Admin Console later. In this situation, see "Recover from a lockout" in the *Kofax Insight Administrator's Guide*.

6. On the **Actions** toolbar, click **Save**.
7. Repeat the procedure for each Insight application on the Application list.

Configure Insight for Windows authentication

Use the procedure in this section to configure Insight for Windows Authentication.

Before configuring Insight, select Windows authentication in IIS for the web application (default website).



1. Navigate to **Insight 6.x.x** > **Admin Console**.
2. Verify that Windows is set as the authentication method for the applicable Insight applications, as described in Set authentication method.
3. User identifier: Specify a way to obtain the user's ID, which should be constant for a specific user's login. Usually, it is a session property (Identity) that looks to the Active Directory domain for the user ID.
   a. In the **Documents Tree**, click **User Mapping**.
   b. On the **UserIdentifier (UID)** tab, set the **Session property** to **Identity**.
4. With **User Mapping** still selected, set the session properties for **User Name** and **Email**.
   a. Click the **User Name** tab, and set the **Session property** to the applicable property for the display name, such as **FullName**.
      User Name is the display name of a user account. Usually, it is one of the Active Directory properties, such as *Identity*, *name*, *FullName*, *displayName* or another convenient property. Your domain administrator can provide all available Active Directory properties.
   b. Click the **Email** tab, and set the **Session property** to **EmailAddress**.
      Email is the email address of the user account. It is used for self-subscriptions only. Usually, it is the Active Directory property *mail* or *EmailAddress*. Your domain administrator can provide the available Active Directory properties.
   c. On the **Actions** toolbar, click **Save**.

5. Assign Insight roles to Windows users. See Assign a role to users.

Manage users and roles

Kofax Analytics for ControlSuite uses roles to manage access rights to different metrics, records, and views.

User access is limited to the set of views assigned within a project based on the assigned roles. For example, if multiple users have access to the same set of views containing labor and operator performance information, you can create a Labor Manager role to assign to users, as applicable. See Assign a role to users.

Create Insight users

If Insight authentication is selected, use Admin Console to set up one or more Insight users and then assign roles to them.

By default, the Administrator user is assigned a password as specified during installation. The Administrator user is assigned to the Administrator role, which allows access to the Insight applications: Admin Console, Studio, Data Loader, and Themes and Formats. If necessary, the Administrator user password settings can be updated after installation.

After installation, the Administrator can add other users.

When using Windows authentication, you do not need to create an Insight user for each dashboard user.

1. Start **Admin Console**.
2. On the **Documents Tree**, click **Users**.
3. Right-click and then click **New User**.
   The **New User** dialog box appears.
4. Enter a name for the user such as ***Labor Manager***, and then click **OK**.
5. Enter a user login, user display name, email address, and password. Also, select the check box if the user should be able to update the password without assistance from the administrator.
6. Select one or more roles to associate with the user.

   > You can assign a user to multiple roles. If you assign a user to multiple roles that have varying access rights, the user is granted combined rights for the assigned roles. The user's default view is based on the default view for the first of the multiple roles, based on the order of the **Roles** list in **Admin Console**. You can right-click a role to move its position on the list.

7. On the **Actions** toolbar, click **Save**.

Assign a role to users

When Insight authentication is enabled, use the following procedure to assign a role to one or more users. If Windows authentication is enabled, see Map roles for Windows users.

The following predefined roles are provided with the Kofax Analytics for ControlSuite product:

- **Administrator**: Grants access to Insight applications: Admin Console, Studio, Data Loader, and Themes and Formats. Also has access to the Viewer. This built-in Insight role is associated with the Administrator user specified during the installation. This role is not intended to be assigned to Kofax Analytics for ControlSuite dashboard users.
- **kafcs admin role**: Grants full access to the Kofax Analytics for ControlSuite dashboard. By default, this role has limited access to Insight Studio and Data Loader.
- **kafcs role**: Grants read-only access to the Kofax Analytics for ControlSuite dashboard.
- **kafcs designer role**: Grants read-only access to the Kofax Analytics for ControlSuite dashboard. By default, grants limited rights to Studio for the purpose of adding custom views, records, or metrics. This role grants read-only rights to the built-in views, records, and metrics delivered with the product and does not allow modifications to them.
- **Default role**: This built-in Insight role is not intended for use with Kofax Analytics for ControlSuite.

1. Start **Admin Console**.
2. In the **Documents Tree**, click and expand **Users**.
3. Select a user name.
4. In the **Roles** section of the user's record, select each role to associate with the selected user. Refer to the preceding description of the roles provided with the product, or create a new role.
5. On the **Actions** toolbar, click **Save**.

Assign multiple users to a role

Use the following procedure to assign multiple users to a role.

1. Start **Admin Console**.
2. In the **Documents Tree**, click and expand **Roles**.
3. Select the role to be assigned to users. Refer to the preceding description of the roles provided with the product, or create a new role.
4. In the middle pane, to the right of the **Fixed values mapping** tab, click the **Insight Users** tab.
5. On the **Insight Users** tab, select the check box for each user to be assigned to the role.
6. On the **Actions** toolbar, click **Save**.

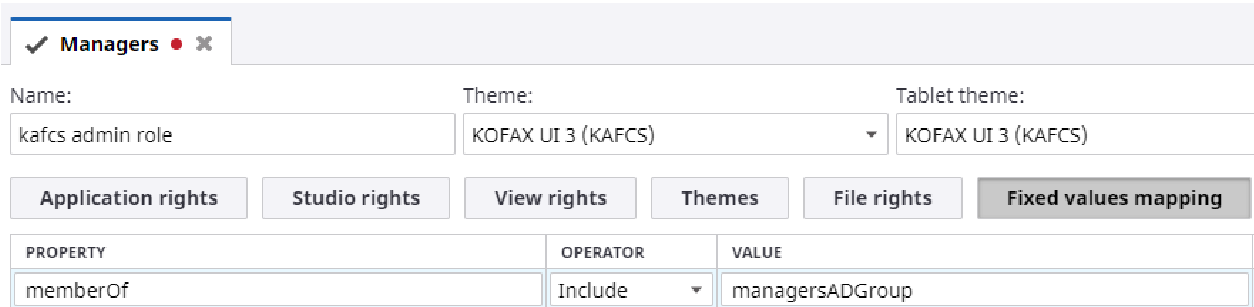
Map roles for Windows users

When Windows authentication is enabled, you need to describe mapping rules for each role. Usually, the Active Directory property *memberOf* is used. In the sample illustration, the Insight Administrator user is assigning the "kafcs admin role" to all Windows users who belong to the Windows group called *managersADGroup.* Your domain administrator can provide you with all available Active Directory properties.

Each row in the mapping grid uses the **AND** operand. If multiple roles on the Roles list match conditions for a user account, the access rights are merged from all matching roles, while other settings (such as the theme or date format) are assigned by the top matching role on the list.

To use the **OR** operand, add all the groups for the *memberOf* property in the same row and separate them by commas. For example, if you add Group1 and Group2 (separated by a comma), the user's group will be matched to Group1 OR Group2 and in case of any match, the user's role is identified.

Other settings, such as theme and date format, are assigned by the top matching role in the list.



1. Start **Admin Console**.
2. In the **Documents Tree**, click and expand **Roles**.
3. Select a role such as Managers to map to Windows users.
4. In the middle pane, select the **Fixed values mapping** tab.
5. Select **Click Here To Add New Data.**
   A row is added to the mapping grid.
6. Set an Active Directory property such as **memberOf**.
7. Set an operator such as **Include**.
8. Set a value such as the Windows group called **managersADGroup**.
9. Add additional rows as applicable.
10. On the **Actions** toolbar, click **Save**.

Use the **Include** operator rather than **Equal**, because the property *memberOf* is a list of items for which you can specify only one item.

Create roles

Use roles to define and manage different levels of access to the Kofax Analytics for ControlSuite dashboard and to Insight applications. In addition to the predefined roles that come with the product, you can set up one or more roles to assign to a user or group of users.

Roles provide access to different views, metrics, and records. You can assign a user to multiple roles. If you assign a user to multiple roles that have varying access rights, the user is granted combined rights for the assigned roles. The user's default view is based on the default view for the first of the multiple roles, based on the order of the Roles list in Admin Console. You can right-click a role to move its position on the list.

1. Start **Admin Console**.
2. On the **Documents Tree**, click **Roles**.
3. Right-click, and then click **New user role**.
   The **New Role** dialog box appears.
4. Enter a name for the role such as ***Manager***, and then click **OK**.
5. In the **Name** field, enter the name for the role.

6. Select a theme from the list to define the visual style and appearance of the dashboard to apply while the role is active.

   > We recommend that you select the Kofax UI 3 Theme for Kofax Analytics for ControlSuite roles.

7. Select the rights that are available while the role is active. Be sure to assign view rights to users who require access to the dashboard Viewer.
8. On the **Actions** toolbar, click **Save**.

Define view rights for a role

Use this procedure to define view rights that determine which dashboard views are available to each role.

1. Start **Admin Console**.
2. In the **Documents Tree**, click and expand **Roles**.
3. On the list of roles associated with your Kofax Analytics for ControlSuite project (such as the **KAFCS** project), select the role for which you are defining view rights.
4. In the right pane, click the **View rights** tab.

   The **View rights** tab is available only for the roles associated with the current Kofax Analytics for ControlSuite project, such as kafcs admin role, kafcs designer role, and kafcs role.
5. Do the following:
   a. Select and expand **KAFCS** (or other project name) to display a list of components.
   b. Select and expand **Views** to display the list of views.
   c. As applicable, select and expand individual views associated with submenu items.
6. Select the check box next to each view that should be available to the selected role.
7. Verify that **Main** is set as the default view for the role.
   - If Main is set as the default view for the role, the PC monitor icon appears next to the view name.
   - If Main is not set as the default view for the role, click **PC default** at the bottom of the screen.

     The monitor icon appears next to the Main view.

     > If the "PC default" button is not available when you click it, you may need to collapse and expand the list of views to enable the button.

8. On the **Actions** toolbar, click **Save**.

Import and export a project

An Insight project is saved in two databases: the project meta database and the project data database. By convention, they are named as <project_name>_ meta and <project_name>_ data, such as *kafcs_meta* and *kafcs_data*. The meta database contains the project definitions such as the data source, records, metric, views (dashboard) and all other Insight documents (objects). The data database stores the data in the project.

Use the Import/Export utility to back up (export) or restore (import) a database. This is useful when you want to move a project across different databases. Although you can use a third-party DBA backup and restore tool for this purpose, this Import/Export utility tool gives you the ability to move the Insight database from one version of SQL to another, or from one DBMS to another.

Export a project

1. Select **Insight 6.x.x** > **Import-Export Tool**.
   The **Import/Export** screen appears.
2. Select **Export**.
3. Select a folder to export (back up) the database to, or click the ellipsis (...) to navigate to a folder. Select an empty folder on the server/computer, such as:
   `C:\Data\KAFCS_Project_Meta\`
4. Provide the connection parameters and credentials for the database, such as kafcs_meta.
5. Click **Connect** to check the connection.
6. Click **Export**.
   The meta database tables are exported to the specified folder.
7. Repeat the same procedure for the other database, such as kafcs_data. Be sure to select a different empty folder such as:
   `C:\Data\KAFCS_Project_Data\`

Import a project

Use this procedure to import a project.

> To import successfully, you must be a user with database ownership (DBO) rights for the Meta and Data databases.

1. Select **Insight 6.x.x** > **Import-Export Tool**.
   The **Import/Export** screen appears.
2. Select **Import**.
3. Select the folder to import (restore) the database from, or click the ellipsis (...) to navigate to the folder. The folder should contain a previously exported project database, such as:
   `C:\Data\KAFCS_Project_Meta\`
4. Provide the connection parameters and credentials for the newly created database, name it such as new_kafcs_meta.
5. Click **Test Connection** to check the connection.
6. Click **Import**.
   The data from database is imported to the specified empty database.
7. Repeat the same procedure for the other database, and be sure to select the folder for the exported data database such as:
   `C:\Data\KAFCS_Project_Data\`

Configure Insight to use new project database location

If you import the project database to a different location, you need to configure Insight to use the updated location. The process involves changing the data source connection strings to the new location.

1. Select **Insight 6.x.x** > **Admin Console.**
2. In the **Documents Tree** under **Projects**, select the KAFCS project and click **Change**.
3. Enter the new connection strings for the project data database and meta database.
4. Click **OK**.

Chapter 5

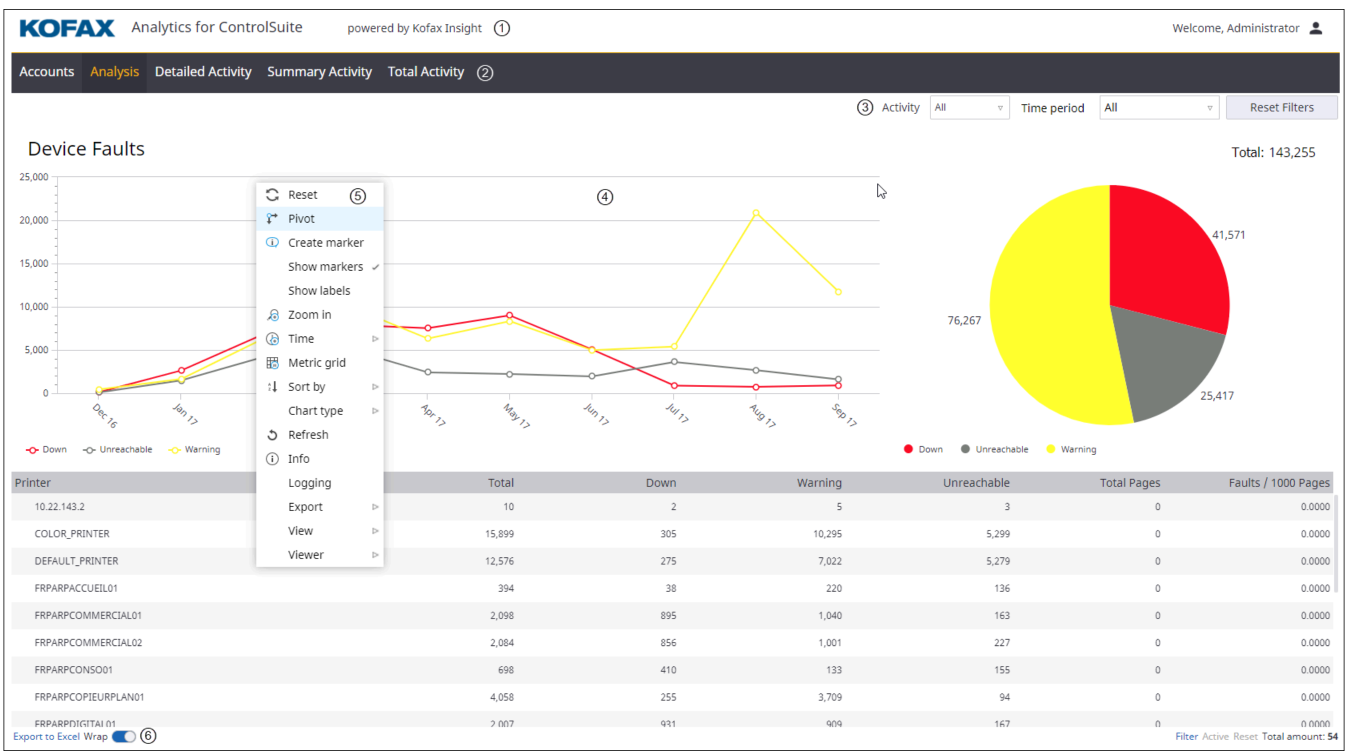
Use Kofax Analytics for ControlSuite

With Kofax Analytics for ControlSuite, you can generate data analytics and then display the data in an interactive dashboard through the Viewer.

The Kofax Analytics for ControlSuite dashboard consists of several sets of views. Each view has graphical elements and other components to retrieve, analyze, and report on data from Kofax ControlSuite. Predefined views configured to analyze your Kofax ControlSuite data are included in your installation.

User interface: Common elements

All Kofax Analytics for ControlSuite views share common elements, as described below:



<table>
<tr><td>1</td><td>Title bar</td><td>Appears on every view and includes:
Title of the application: Kofax Analytics for ControlSuite
Name of the logged-in user
Additional user menu items:
Language: Switches the dashboard display to another language.
Bookmark: Adds a frequently used view as a favorite and sets bookmark visibility for public, personal, or selected roles.
About: Displays the currently installed version of Kofax Analytics for ControlSuite.
Logout: Logs out current user from the application.</td></tr>
<tr><td>2</td><td>Menu bar</td><td>Use the menu bar to access the following views:
Accounts:
Account Adjustment
Account Listing
Department Activity
Department Expense
User Activity
User Expense
Analysis:
Activity by Application
Device Faults
Savings
Detailed Activity:
Detailed Activity by Account
Detailed Activity by Device
Summary Activity:
Summary Activity by Account
Summary Activity by Device
Total Activity:
Average Activity by Time
Device Activity
Admin:
Savings Report Metrics</td></tr>
<tr><td>3</td><td>Global filters</td><td>Use the global filters to manage the data displayed on the dashboard view. Each view includes additional filters.</td></tr>
<tr><td>4</td><td>Viewer</td><td>Displays the selected dashboard view.</td></tr>
<tr><td>5</td><td>Context menus and chart/table options</td><td>Right-click a chart or table to access options such as Reset, Pivot, Zoom in, View, and Metric grid format as applicable. The options vary based on the chart type or area where you right-click.</td></tr>
<tr><td>6</td><td>Chart and grid footers</td><td>Additional features are available in the footer on some charts and grids. Features may include Export to Excel, text wrap settings, filters and reset. Footers may also include chart-or-grid-specific summary data such as total number of rows.</td></tr>
</table>

Global filters

The data displayed in all the views is affected by the following filters.

Activity

Set preferences for activity types to include in the views:

- **Copy**
- **Print**
- **Scan**

Click the **All/Clear** button to displays data for all activity types. Click again to clear all the selections.

Click the Search icon to locate a certain activity type.

Click **OK** to apply the selection.

Default filter is set to All.

The Activity filter is not applied to the following views:

- Account Adjustments
- Account Listing:
  - Billing Code Account Listing
  - Department Account Listing
  - User Account Listing
  - Vending Account Listing
- Activity by Application
- Device Faults
- Savings
- Savings Report Metrics

Time period

Select the time period to include in the view.

Time period options include:

- Last hour
- Current day
- Last 24 hours
- Last 48 hours
- Last 7 days
- Last 30 days
- Previous quarter

- Last 12 months
- Last 24 months
- All: Select to display all historical data.
- Custom: Select to specify the time period by date and time.

Default time period is one month back through the current time.

Reset Filters

Click **Reset Filters** to restore all filters to their default values.

Viewer

Use the Viewer to display the dashboard views included in your Kofax Analytics for ControlSuite installation. These views include a variety of visual and analytical representations of data using charts, grids, pivot tables, and reports. System administrators, business process managers, and other stakeholders use this interface to gain visibility into analytical information.

You can display data in standard or custom views generated from data stored within the Kofax Analytics for ControlSuite database. You can also extract information from Kofax ControlSuite databases.

With the appropriate product license, you can use Kofax Insight to create new views. You can also copy a view supplied with your Kofax Analytics for ControlSuite installation, save it under a new name, and then apply your modifications. See *Kofax Insight Documentation* for more information.

Open the Viewer

To open the Viewer (or dashboard), follow the procedure in this section.

> The recommended monitor resolution is 1280x1024.

1. Do one of the following to open the Viewer:
   - On Windows Start menu, navigate to **Insight 6.x.x** > **Viewer**.
   - Open a web browser and enter the following URL:

     `http[s]://<server>:<port>/Insight/View/`

     where `<server>` is the name of your Insight server

     and `<port>` is included in the URL if the port differs from the default for HTTP (80) or HTTPS (443)

     Be sure to verify that the website's binding host name is set to blank or localhost in your IIS settings. Otherwise, a login error may occur.

   A login window may appear (it does not appear if an authentication method is not currently enabled, or if Windows authentication is enabled and the user is already authenticated).

2. Enter valid login credentials and click **Login**.

   To ensure proper viewing, verify the appropriate Authentication Method setting for the Viewer in Admin Console. The "No authentication" setting does not enforce Kofax ControlSuite batch class assignments.

   Also, if Main is not selected as the default view for the role associated with the user who is logging in, the following error may appear:

   `You can specify view name parameter in Admin Tool`

   Resolve the issue by setting Main as the default view.

Use the Viewer

While working with the Viewer, you can do the following:

- Double-click a table line to zoom on a table detail.
- Manipulate and interact with any component on the dashboard.
- Hover over a chart element such as a bar in a bar chart, or a segment in a pie chart to view details such as session time, quantity, modified date, and percentages.
- Right-click a graph or table to configure the components in the Viewer.

See Help for Insight Viewer for more details.

Adjust the Refresh Interval

Some components in the Viewer are visually refreshed automatically at regular intervals. When the refresh occurs, any expandable components are automatically collapsed.

You can use Insight Studio to turn off auto refresh, or to reduce the auto refresh frequency by increasing the interval for a given component. By default, a 60-second minimum Refresh Interval is applied to charts. For record grids, the Refresh Interval is disabled by default.

1. Start Insight Studio.
2. On the **Documents Tree**, click and expand **Views**.
3. On the **Views** list, select a view that contains an expandable component.

   The grid for the selected view appears.
4. Select the expandable component.
5. On the **Property** pane, in the **Other** section, click the ellipsis next to the **Refresh Interval** property.

   The **Edit Date Time Interval** window appears.
6. Do one of the following:
   - To turn off auto refresh for the selected component, verify that the **Interval** value is set to 00:00:00, and click **OK**.
   - To reduce the auto refresh interval for the selected component, set the **Interval** to a value higher than 60 seconds, and click **OK**. The format is hh:mm:ss.
7. Click **Save**.

Export to Excel

On any grid with **Export to Excel** functionality, you can select preferences that affect the content and format when the grid is exported to Microsoft Excel.

1. On a grid with **Export to Excel** enabled, select **Export to Excel**.
   The **Export to Excel** window appears.
2. Select an **Export content** option:
   - **Current page and top drill down**
   - **All pages of a grid, top drill down level. Could take some time.**
   - **All pages of a grid, all drill down levels. Could take much longer.**
3. Select an **Export format** option:
   - **Unformatted XML file, readable by Excel**
   - **Formatted Excel file**
   - **Unformatted CSV file**
   - **Unformatted TSV file**
4. Optionally select **Enabled** to use a flat export, which retains granular details for drill down or expandable data.
5. Click **OK** and when prompted, save or open the .xml file.

Chapter 6

Dashboard views

This chapter explains how to work with the charts and tables displayed in the Kofax Analytics for ControlSuite dashboard views.

Use the following menus to access Kofax Analytics for ControlSuite views:

- Accounts
- Analysis
- Detailed Activity
- Summary Activity
- Total Activity
- Admin

Landing page

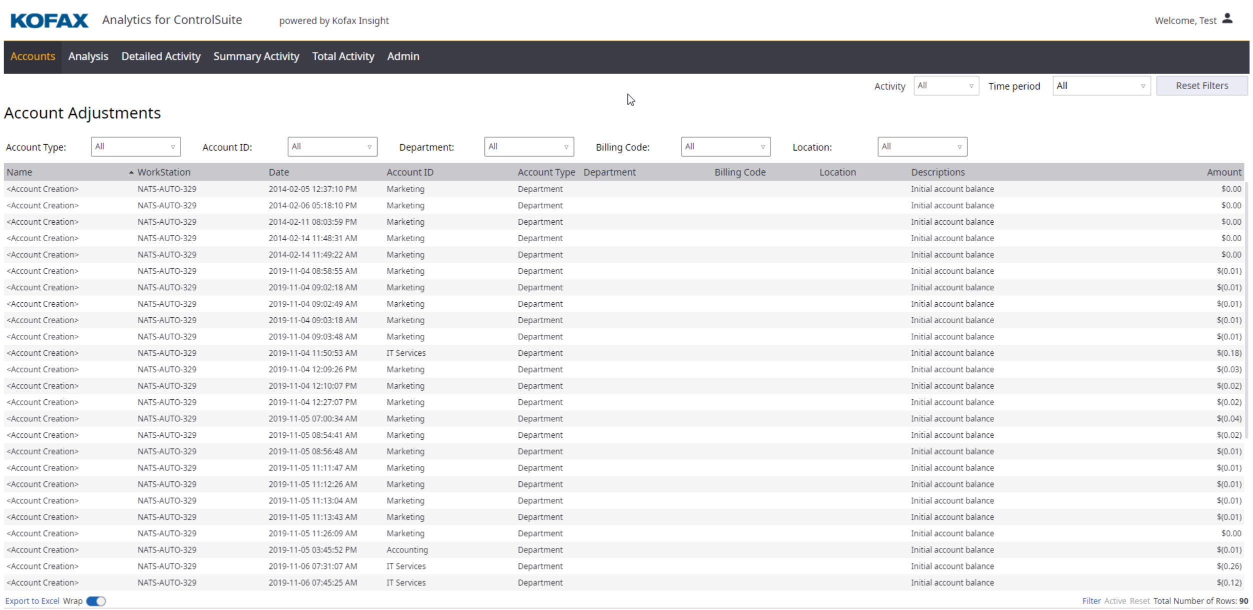
When you start Kofax Analytics for ControlSuite, the landing page is set by default to the Average Activity by Time view filtered by number of pages.

See Average Activity by Time for more details.

Account Adjustment

The Account Adjustment view is available from the **Accounts** menu. This view details adjustments made to each account over a certain period of time.

The data is displayed in real-time.



You can configure the following filters.

Account Type	• Select one or more account types from the list. • **All/Clear**: Displays data for all account types. Click again to clear all the selections. Click the Search icon to locate a certain account type. Default filter is set to **All**.
Account ID	• Select one or more account IDs from the list. • **All/Clear**: Displays data for all account IDs. Click again to clear all the selections. Click the Search icon to locate a certain account ID. Default filter is set to **All**.
Department	• Select one or more departments from the list. • **All/Clear**: Displays data for all departments. Click again to clear all the selections. Click the Search icon to locate a certain department.

	Default filter is set to **All**.
Billing Code	• Select one or more billing codes as applicable to the selected account. • **All/Clear**: Displays data for all billing codes. Click again to clear all the selections. Click the Search icon to locate a certain billing code. Default filter is set to **All**.
Location	• Select one or more locations from the list. • **All/Clear**: Displays data for all locations. Click again to clear all the selections. Click the Search icon to locate a certain location. Default filter is set to **All**.

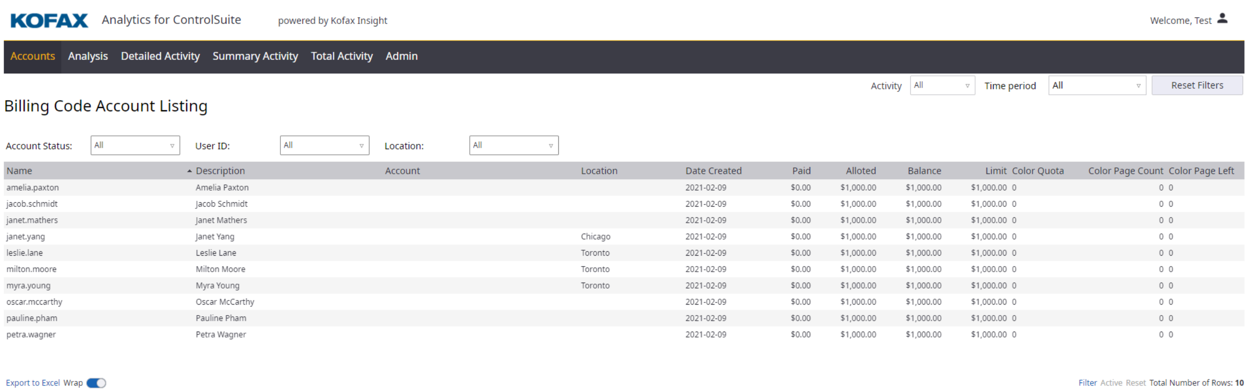
The data is displayed in a table with values for Equitrac properties including the followings.

Value	Description
Name	Account name.
WorkStation	Name of the computer that is used to make the adjustment.
Date	Date when the adjustment was made.
Account ID	Account ID associated with the account.
Account Type	Account type.
Department	Department the account belongs to.
Billing Code	Billing Code associated with the account.
Location	Location associated with the selected department.
Descriptions	Adjustment details.
Amount	Account balance.

Billing Code Account Listing

The Billing Code Account Listing view is available from the **Account Listing** menu. This view lists all the Billing Code accounts and their details.

The data is displayed in real-time.



You can configure the following filters.

Account Status	• Select one or more account statuses from the list. • **All/Clear**: Displays data for all account statuses. Click again to clear all the selections. Click the Search icon to locate a certain account status. Default filter is set to **All**.
User ID	• Select one or more user IDs from the list. • **All/Clear**: Displays data for all user IDs. Click again to clear all the selections. Click the Search icon to locate a certain user ID. Default filter is set to **All**.
Location	• Select one or more locations from the list. • **All/Clear**: Displays data for all locations. Click again to clear all the selections. Click the Search icon to locate a certain location. Default filter is set to **All**.

The account details appear in table format with the following values.

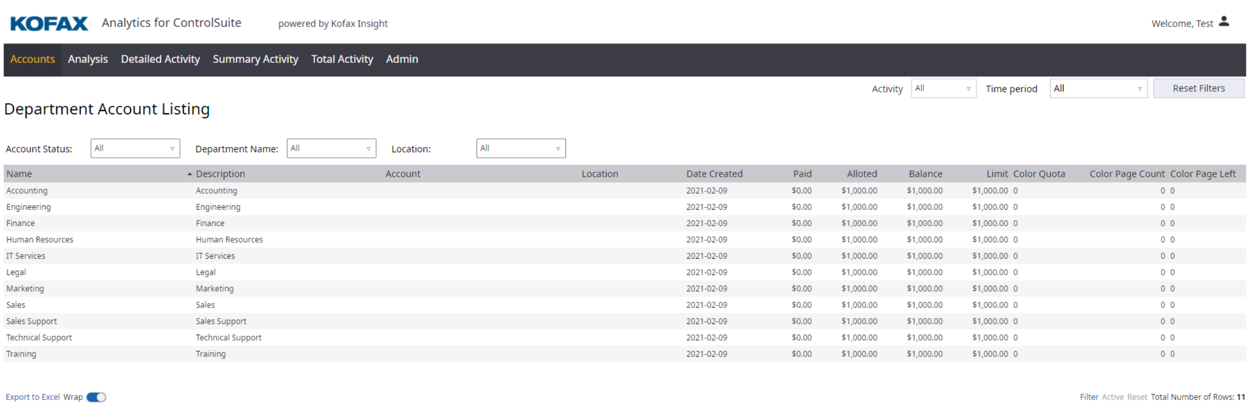
Value	Description
Name	User ID associated with the account.
Description	User Name associated with the account.
Account	Account type.
Location	Location associated with the selected account.
Date created	Date account was created.
Paid	Amount paid by the account during the selected time period.
Allotted	Initial amount assigned to the account for use before the funds are actually paid.

Value	Description
Balance	Account balance for the selected time period.
Limit	Account limit.
Color Quota	Maximum number of color pages the account can release during the selected time period.
Color Page Count	Number of color pages the account releases during the selected time period.
Color Pages Left	Remaining number of color pages that can be released for the account during the selected time period.

Department Account Listing

The Department Account Listing view is available from the **Account Listing** menu. This view lists all the department accounts and their details.

The data is displayed in real-time.



You can configure the following filters.

Account Status	• Select one or more account statuses from the list. • **All/Clear**: Displays data for all account statuses. Click again to clear all the selections. Click the Search icon to locate a certain account status. Default filter is set to **All**.
Department Name	• Select one or more departments from the list. • **All/Clear**: Displays data for all departments. Click again to clear all the selections. Click the Search icon to locate a certain department. Default filter is set to **All**.
Location	• Select one or more locations from the list. • **All/Clear**: Displays data for all locations. Click again to clear all the selections. Click the Search icon to locate a certain location. Default filter is set to **All**.

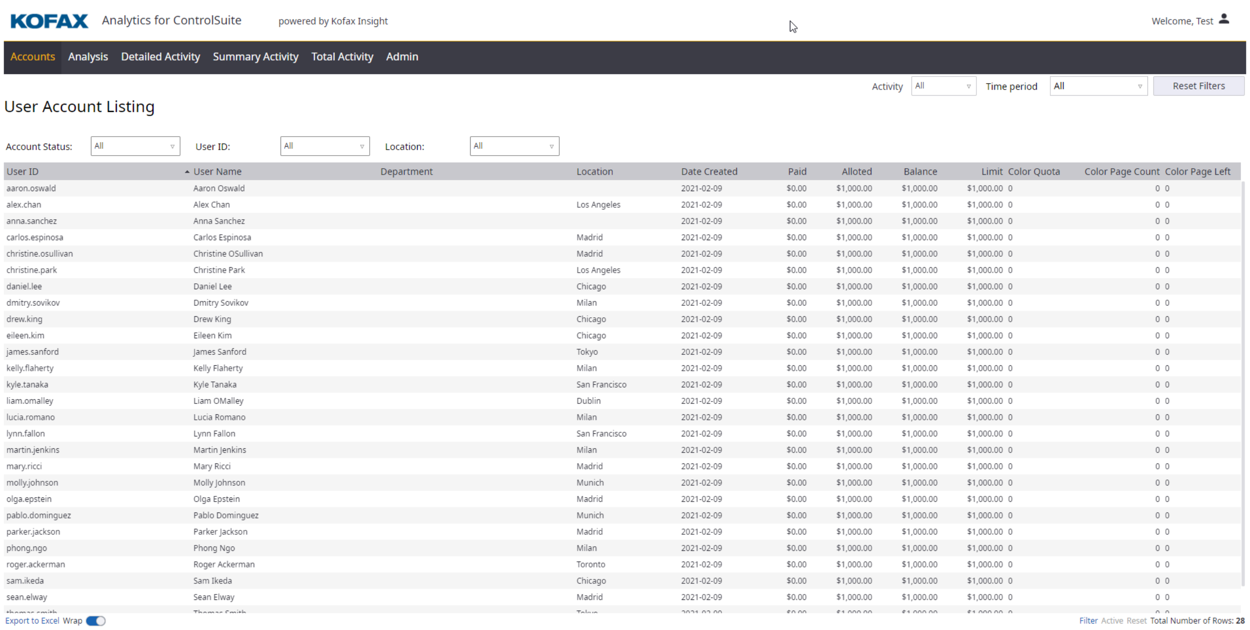
The account details appear in table format with the following values.

Value	Description
Name	User ID associated with the account.
Description	User Name associated with the account.
Account	Account type.
Location	Location associated with the selected account.
Date created	Date account was created.
Paid	Amount paid by the account during the selected time period.
Allotted	Initial amount assigned to the account for use before the funds are actually paid.
Balance	Account balance for the selected time period.
Limit	Account limit.
Color Quota	Maximum number of color pages the account can release during the selected time period.
Color Page Count	Number of color pages the account releases during the selected time period.
Color Pages Left	Remaining number of color pages that can be released for the account during the selected time period.

User Account Listing

The User Account Listing view is available from the **Account Listing** menu. This view lists all the User accounts and their details.

The data is displayed in real-time.



You can configure the following filters.

Account Status	• Select one or more account statuses from the list. • **All/Clear**: Displays data for all account statuses. Click again to clear all the selections. Click the Search icon to locate a certain account status. Default filter is set to **All**.
User ID	• Select one or more user IDs from the list. • **All/Clear**: Displays data for all user IDs. Click again to clear all the selections. Click the Search icon to locate a certain user ID. Default filter is set to **All**.
Location	• Select one or more locations from the list. • **All/Clear**: Displays data for all locations. Click again to clear all the selections. Click the Search icon to locate a certain location. Default filter is set to **All**.

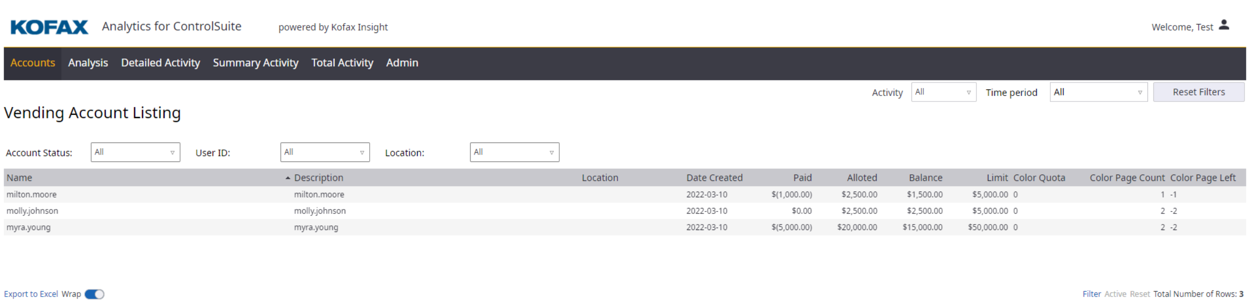
The account details appear in table format with the following values.

Value	Description
User ID	User ID associated with the account.
User Name	User Name associated with the account.
Department	Department the account belongs to.
Location	Location associated with the selected account.
Date created	Date account was created.
Paid	Amount paid by the account during the selected time period.
Allotted	Initial amount assigned to the account for use before the funds are actually paid.
Balance	Account balance for the selected time period.
Limit	Account limit.
Color Quota	Maximum number of color pages the account can release during the selected time period.
Color Page Count	Number of color pages the account releases during the selected time period.
Color Pages Left	Remaining number of color pages that can be released for the account during the selected time period.

Vending Account Listing

The Vending Account Listing view is available from the **Account Listing** menu. This view lists all the Vending accounts and their details.

The data is displayed in real-time.



You can configure the following filters.

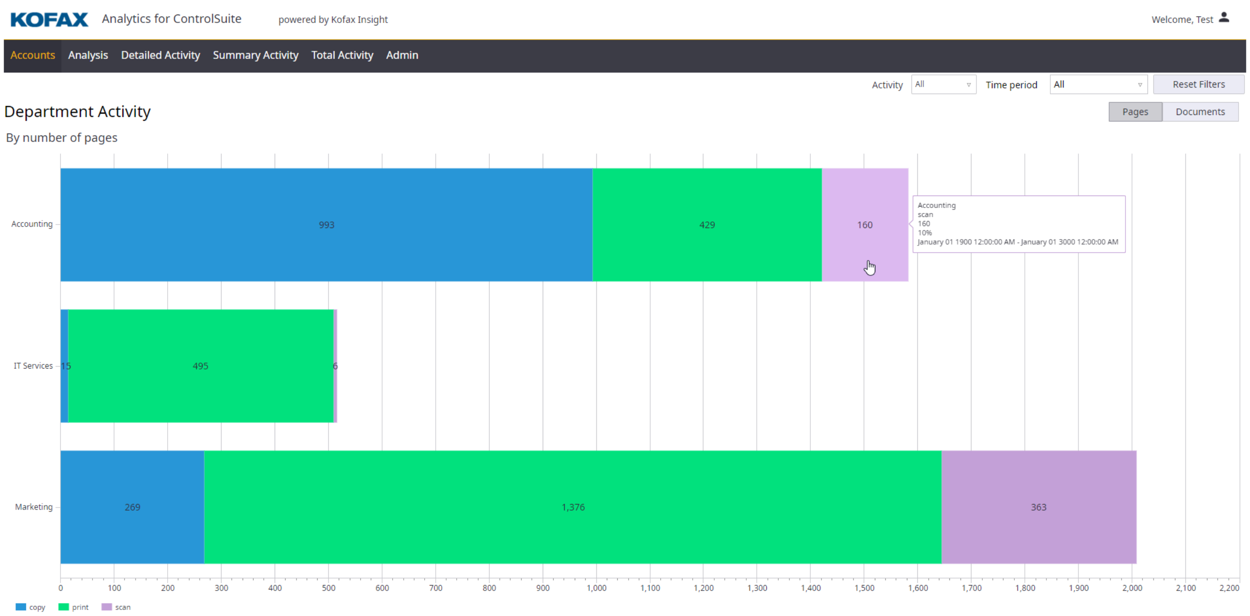
Account Status	• Select one or more account statuses from the list. • **All/Clear**: Displays data for all account statuses. Click again to clear all the selections. Click the Search icon to locate a certain account status. Default filter is set to **All**.
User ID	• Select one or more user IDs from the list. • **All/Clear**: Displays data for all user IDs. Click again to clear all the selections. Click the Search icon to locate a certain user ID. Default filter is set to **All**.
Location	• Select one or more locations from the list. • **All/Clear**: Displays data for all locations. Click again to clear all the selections. Click the Search icon to locate a certain location. Default filter is set to **All**.

The account details appear in table format with the following values.

Value	Description
Name	User ID associated with the account.
Description	User Name associated with the account.
Location	Location associated with the selected account.
Date created	Date account was created.
Paid	Amount paid by the account during the selected time period.
Allotted	Initial amount assigned to the account for use before the funds are actually paid.
Balance	Account balance for the selected time period.
Limit	Account limit.
Color Quota	Maximum number of color pages the account can release during the selected time period.
Color Page Count	Number of color pages the account releases during the selected time period.
Color Pages Left	Remaining number of color pages that can be released for the account during the selected time period.

Department Activity

The Department Activity view is available from the **Accounts** menu. This view displays department activity by number of pages or by document volume.



It can be difficult to interpret the graph if too many values are displayed at the same time. Therefore, you can set preferences for the number of values to appear in the view, such as the top 10, 20 or other. Upon selecting this view from the **Accounts** menu, if the number of values reported exceeds 20, you are prompted to specify the number of values displayed from the **Display categories** dialog box:

- Click **Display top X values** and enter the number of the displayed values.
- Click **Display all values** to show all values in the graph.

Default value is the top 20 values.

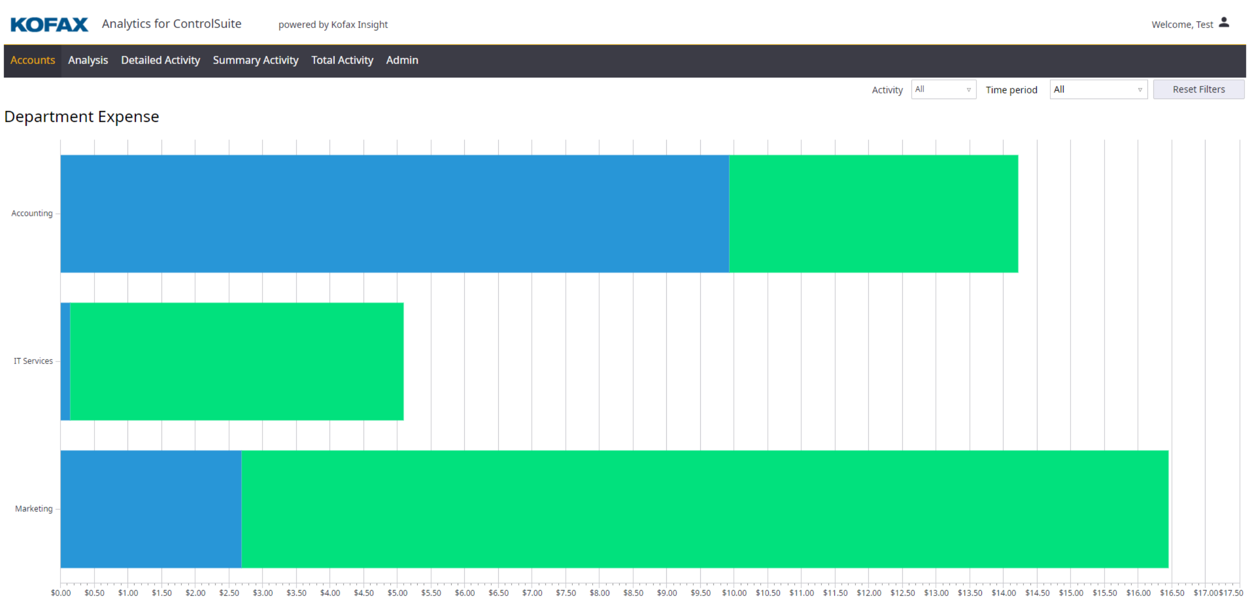
You can configure the following filters.

Page/Documents	Select one of the following display preferences: • Pages to show data as total page volume. • Document to show data as total document volume. Default value is set to Pages.
Location	• Select one or more locations from the list. • **All/Clear**: Select all locations from the list. Click again to clear all the selections. Click the Search icon to locate a certain location. Default filter is set to **All**.
Department	• Select one or more departments from the list. • **All/Clear**: Select all departments from the list. Click again to clear all the selections. Click the Search icon to locate a certain department. Default filter is set to **All**.

To configure the sort order of the data displayed, right-click on the graph, select **Sort by**, and then select the dimensions according to which to sort data, or select **Ascending** or **Descending** sorting order.

Department Expense

The Department Expense view is available from the **Accounts** menu. This view displays the departments with the highest or lowest total costs over a certain period of time.

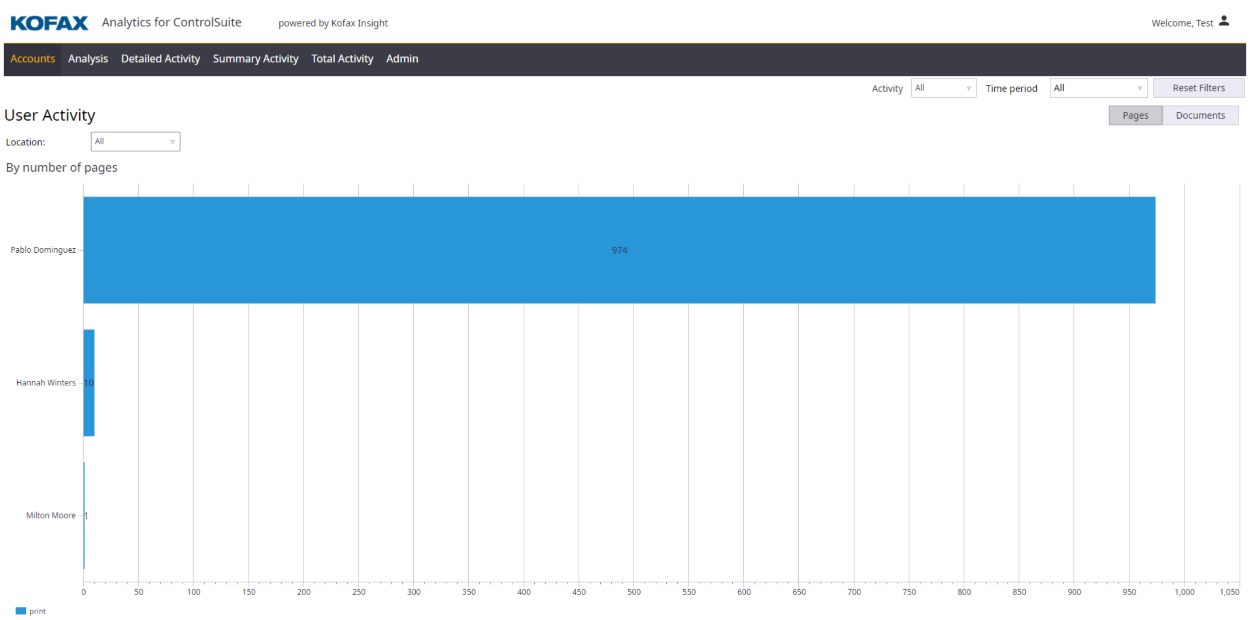


You can configure the following filters.

Location	• Select one or more locations from the list. • **All/Clear**: Select all locations from the list. Click again to clear all the selections. Click the Search icon to locate a certain location. Default filter is set to **All**.
Department	• Select one or more departments from the list. • **All/Clear**: Select all departments from the list. Click again to clear all the selections. Click the Search icon to locate a certain department. Default filter is set to **All**.

User Activity

The User Activity view is available from the **Accounts** menu. This view displays user activity by total page or by document volume.



It can be difficult to interpret the graph if too many values are displayed at the same time. Therefore, you can set preferences for the number of values to appear in the view, such as the top 10, 20 or other. Upon selecting this view from the **Accounts** menu, if the number of values reported exceeds 20, you are prompted to specify the number of values displayed from the **Display categories** dialog box:

- Click **Display top X values** and enter the number of the displayed values.
- Click **Display all values** to show all values in the graph.

Default value is the top 20 values.

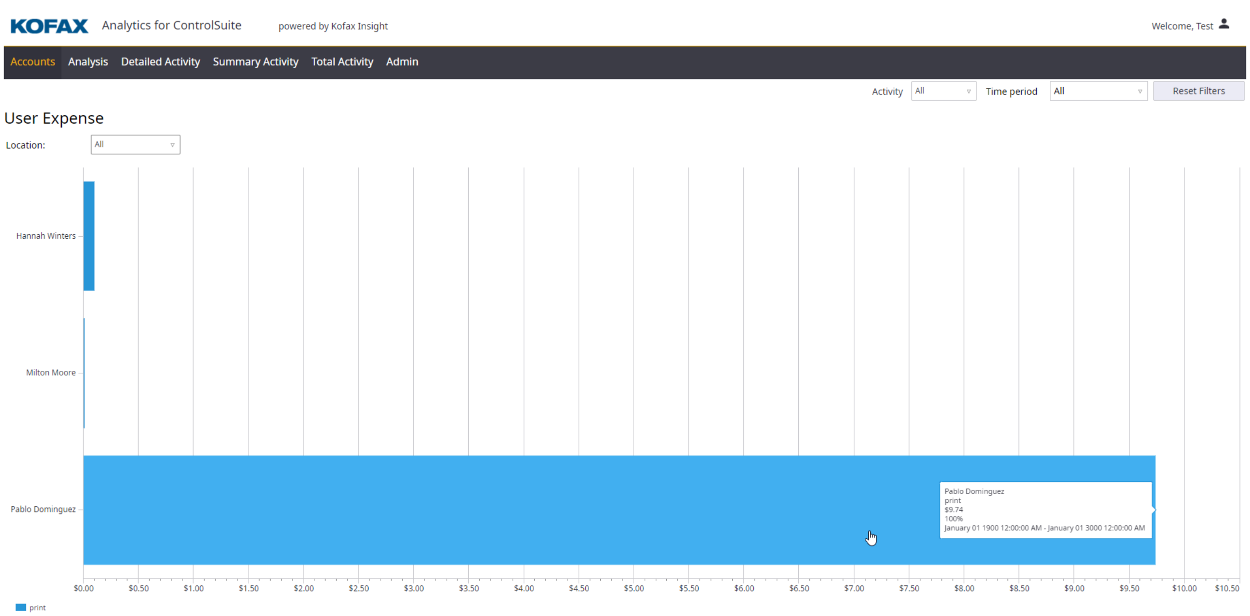
You can configure the following filters.

Page/Documents	Select one of the following display preferences: • **Pages** to show data as total page volume. • **Document** to show data as total document volume. Default value is set to **Pages**.
Location	• Select one or more locations from the list. • **All/Clear**: Select all locations from the list. Click again to clear all the selections. Click the Search icon to locate a certain location. Default filter is set to **All**.

To configure the sort order of the data displayed, right-click on the graph, select **Sort by**, and then select the dimensions according to which to sort data, or select **Ascending** or **Descending** sorting order.

User Expense

The User Expense view is available from the **Accounts** menu. This view displays users with the highest or lowest total costs over a period of time.



It can be difficult to interpret the graph if too many values are displayed at the same time. Therefore, you can set preferences for the number of values to appear in the view, such as the top 10, 20 or other. Upon selecting this view from the **Accounts** menu, if the number of values reported exceeds 20, you are prompted to specify the number of values displayed from the **Display categories** dialog box:

- Click **Display top X values** and enter the number of the displayed values.
- Click **Display all values** to show all values in the graph.

Default value is the top 20 values.

You can configure the following filter.

Location	• Select one or more locations from the list. • **All/Clear**: Select all locations from the list. Click again to clear all the selections. Click the Search icon to locate a certain location. Default filter is set to **All**.

To configure the sort order of the data displayed, right-click on the graph, select **Sort by**, and then select the dimensions according to which to sort data, or select **Ascending** or **Descending** sorting order.

Activity by Application

The Activity by Application view is available from the **Analysis** menu. This view displays the print submission activity in the application over a certain period of time.

The data is displayed in real-time.

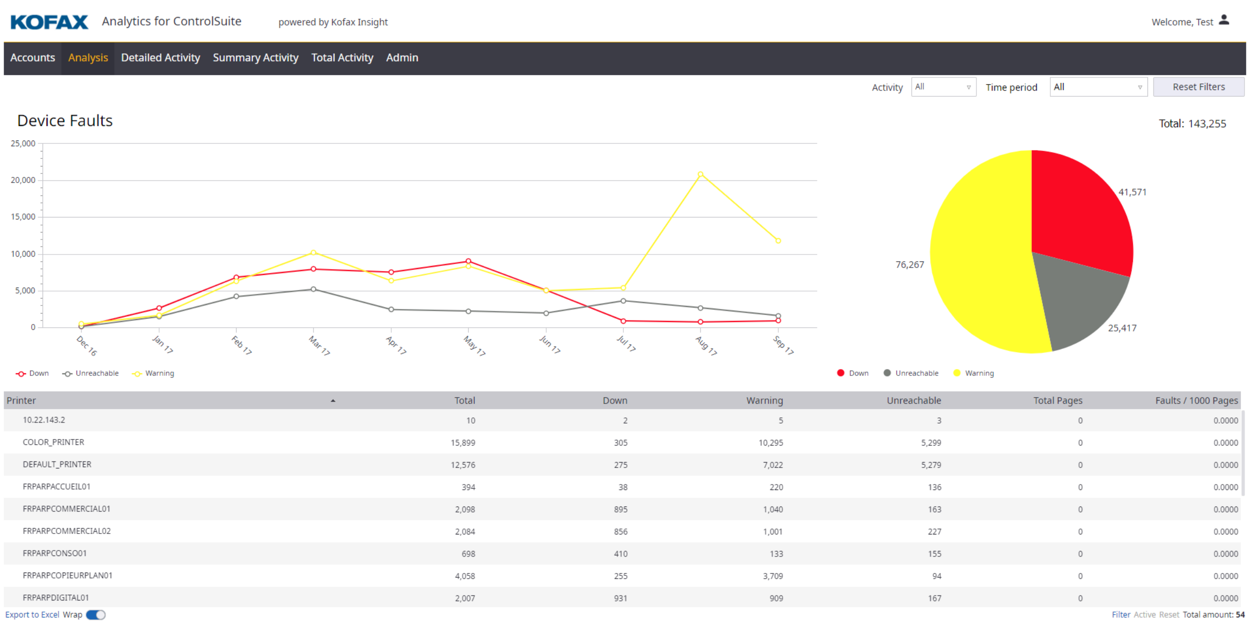
You can configure the following filter.

Page/Documents	Select one of the following display preferences: • **Pages** to show data as total page volume. • **Document** to show data as total document volume. Default value is set to **Pages**.

Device Faults

The Device Faults view is available from the **Analysis** menu. This view presents how often the device functions improperly over a certain period of time. Device faults are reported in three types including Down, Warning, and Unreachable.

The data is displayed in real-time.



The line graph illustrates the number of device faults by each type on a monthly basis.

The pie chart displays the percentage of each device fault type over the period filtered.

The table shows details of device faults for each printer. The following table lists the values that appear in the onscreen table.

Value	Description
Printer	Device that faces the fault.
Total	Total number of device faults.
Down, Warning, Unreachable	Device fault type.
Total Pages	Total number of pages that failed to be released.

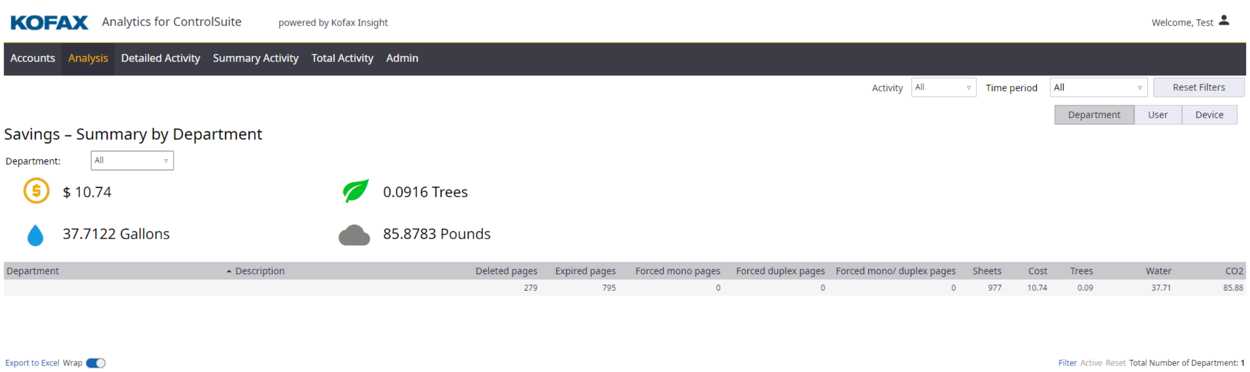
Value	Description
Faults/1000 Pages	Ratio of faults per 1000 pages.

Savings

The Savings view is available from the **Analysis** menu. This view details the cost savings and environmental impacts associated with using an Equitrac system. It shows how many pages have been printed from a workstation, but have not been released to the printer (such as expired or deleted jobs). Cost savings can be also measured by the number of forced monochrome or forced duplex pages. Additionally, this view details the estimated environmental savings such as the number of trees and amount of water saved, plus the volume of CO2 (carbon dioxide) not released into the atmosphere by not printing expired or deleted jobs, or by forcing simplex jobs to be duplexed.

The measurement of environmental savings is configured from the Savings Report Metrics view. See Savings Report Metrics for more details.

The data is displayed in real-time.



You can configure the following filters.

Department/User/Device	Use this option to show the values based on: • **Department**: Select one or more items from the list of departments. • **User**: Select one or more users from the list of User IDs. • **Device**: Select one or more items from the list of devices. Default value is set to **Department**.

Department	The Department filter is available from the Savings - Summary by Department view. • Select one or more departments from the list. • **All/Clear**: Displays data for all departments. Click again to clear all the selections. Click the Search icon to locate a certain department. Default filter is set to **All**.
User IDs	The User ID filter is available from the Savings - Summary by User view. • Select one or more user IDs from the list. • **All/Clear**: Displays data for all user IDs. Click again to clear all the selections. Click the Search icon to locate a certain user ID. Default filter is set to **All**.
Device	The Device filter is available from the Savings - Summary by Device view. • Select one or more devices from the list. • **All/Clear**: Displays data for all devices. Click again to clear all the selections. Click the Search icon to locate a certain device. Default filter is set to **All**.

The table shows details of the estimated savings with the following values.

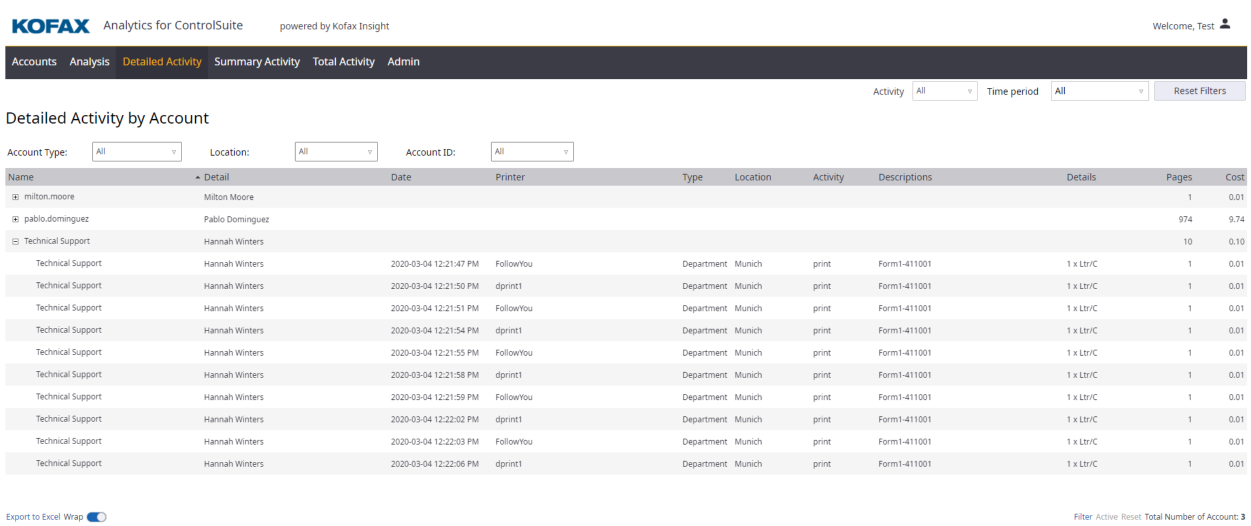
Value	Description
Department	Department that the savings are estimated for. This value appears when you filter the view by Department.
User	User that the savings are estimated for. This value appears when you filter the view by User.
Device	Device that the savings are estimated for. This value appears when you filter the view by Device.
Description	Details of the department or device.
Deleted pages	Number of deleted pages during the selected time period.
Expired pages	Number of expired pages during the selected time period.
Forced mono pages	Number of black and white pages released during the selected time period.
Forced duplex pages	Number of duplex pages released during the selected time period.
Forced mono/duplex pages	Number of pages released with both forced mono and duplex pages.

Value	Description
Sheets	Number of sheets not released during the selected time period.
Cost	Total cost for Deleted, Expired, Forced mono pages, Forced duplex pages and number of sheets not printed during the selected time period.
Trees	Estimated number of trees that was saved during the selected time period.
Water (gallons)	Estimated amount of water (in gallon) that was saved during the selected time period.
CO2 (pounds)	Estimated volume of carbon dioxide not released into the atmosphere by not printing the jobs or by printing forced mono pages and forced duplex pages during the selected time period.

Detailed Activity by Account

The Detailed Activity by Account view is available from the **Detailed Activity** menu. This view displays detailed activity by user account over a certain period of time.

The data is displayed in real-time.



You can configure the following filters.

Account type	• Select one or more account types from the list. • **All/Clear**: Displays data for all account types. Click again to clear all the selections. Click the Search icon to locate a certain account type. Default filter is set to **All**.
Location	• Select one or more locations from the list. • **All/Clear**: Displays data for all locations. Click again to clear all the selections. Click the Search icon to locate a certain location. Default filter is set to **All**.
Account ID	• Select one or more account IDs from the list. • **All/Clear**: Displays data for all account IDs. Click again to clear all the selections. Click the Search icon to locate a certain account ID. Default filter is set to **All**.

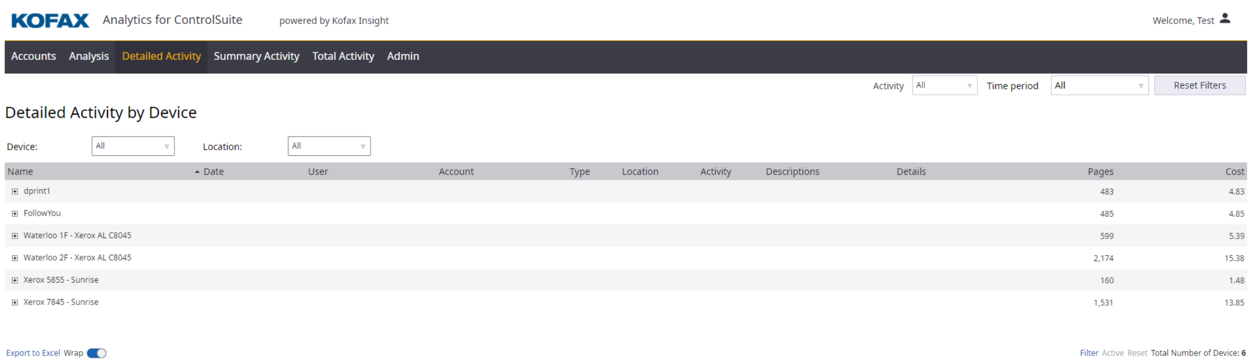
Data is grouped by account and presented in a table with the following values.

Value	Description
Name	Account name.
Detail	Account detail.
Date	Date of the activity.
Printer	Device where the activity is performed.
Type	User account type.
Location	Account location.
Activity	Activity performed.
Descriptions	Details of the activity.
Details	Details of the account.
Pages	Number of pages that the activity consumes.
Cost	Cost of the activity.

Detailed Activity by Device

The Detailed Activity by Device view is available from the **Detailed Activity** menu. This view presents details of all device activity over a certain period of time in a table.

The data is displayed in real-time.



You can configure the following filters.

Device	• Select one or more devices from the list. • **All/Clear**: Displays data for all devices. Click again to clear all the selections. Click the Search icon to locate a certain device. Default filter is set to **All**.
Location	• Select one or more locations from the list. • **All/Clear**: Displays data for all locations. Click again to clear all the selections. Click the Search icon to locate a certain location. Default filter is set to **All**.

Data is grouped by device and presented in a table with the following values.

Value	Description
Name	Device name.
Date	Date of the activity.
User	Name of the user who performs the activity.
Account	User account.
Type	User account type.
Location	Account location.
Activity	Activity performed.
Description	Details of the activity.
Details	Details of the account.
Pages	Number of pages that the activity consumes.
Cost	Cost of the activity.

Summary Activity by Account

The Summary Activity by Account view is available from the **Summer Activity** menu. This view details the activity of each account by **Date**, **Device**, **Network User**, **Transaction Type**, **Paper Size** and **Mobile Type** over a certain period of time.

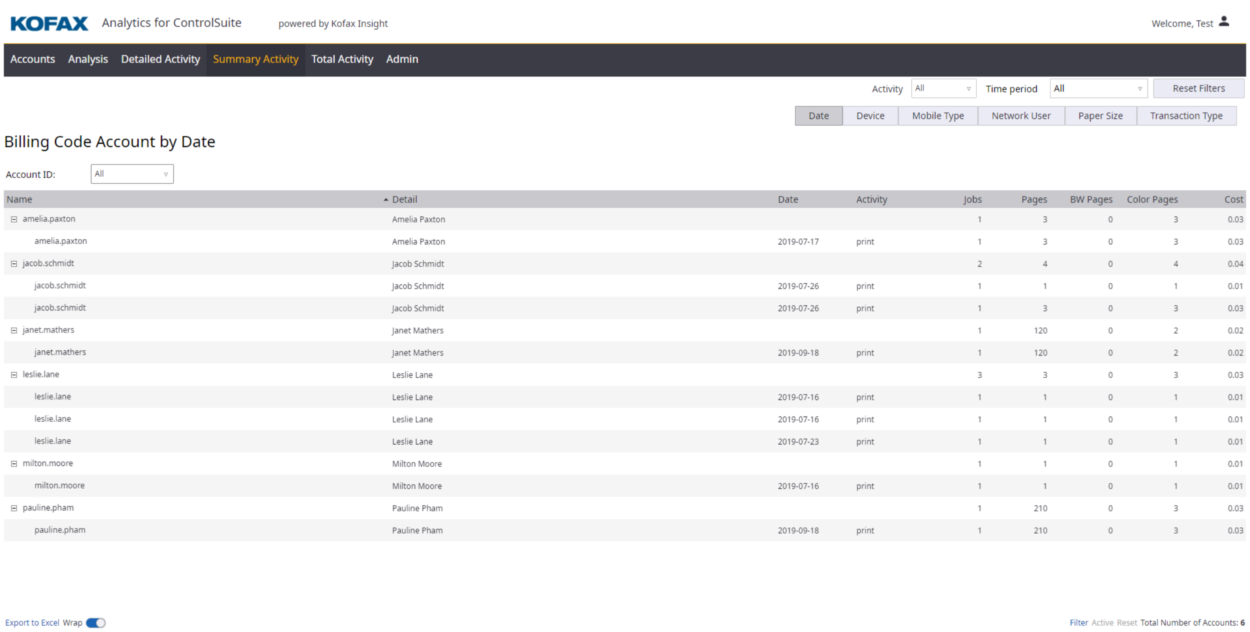
The data is displayed in real-time.

Based on the account types, account activities are reported for:

- Billing Code Account
- Department Account
- Network User
- Network User and Device
- Organization Account
- User Account

Billing Code Account

The Summary Activity by Billing Code Account view details the activity of billing code accounts by Date, Device, Network User, Transaction Type, Paper Size and Mobile Type.



You can configure the following filters.

Date	Select to display the activity by date.
Device	Select to display the activity by device.
Network User	Select to display the activity by network user.

Transaction Type	Select to display the activity by transaction type.
Paper Size	Select to display the activity by paper size.
Mobile Type	Select to display the activity by mobile type.
Account ID	• Select one or more account IDs from the list. • **All/Clear**: Displays data for all account IDs. Click again to clear all the selections. Click the Search icon to locate a certain account ID. Default filter is set to **All**.

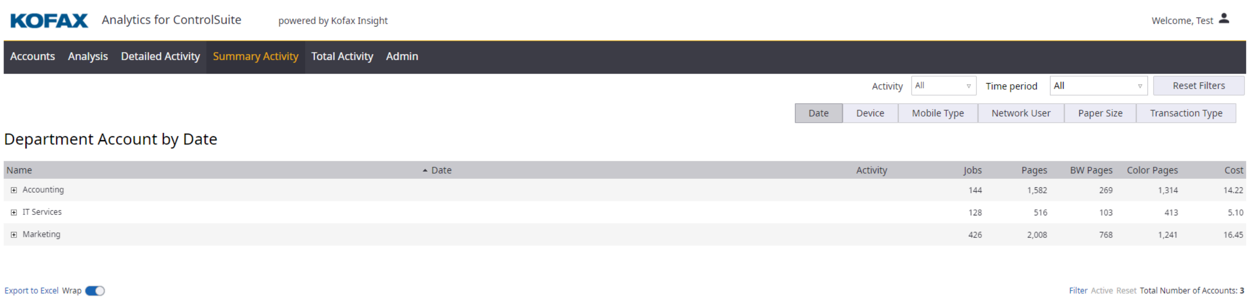
Data is grouped by billing code accounts and presented in a table with the following values.

Value	Description
Name	Billing code name.
Detail	Billing code detail.
Date	Date when the activity is performed. This value appears when you filter the view by Date.
Activity	Activity type. This value appears when you filter the view by Date, Device, Network User and Paper Size.
Printer	Device that performs the activity. This value appears when you filter the view by Device.
Description	Details of the activity. This value appears when you filter the view by Device and Network User.
Transaction Type	Transaction Type. This value appears when you filter the view by Transaction Type.
Size	Paper size. This value appears when you filter the view by Paper Size.
Mobile Print Type	Mobile Print Type. This value appears when you filter the view by Mobile Type.
Jobs	Number of jobs the account releases during the selected time period.
Pages	Number of pages the account releases during the selected time period.
BW Pages	Number of black and white pages the account releases during the selected time period.
Color Pages	Number of color pages the account releases during the selected time period.

Value	Description
Cost	Total cost the account consumes during the selected time period.

Department Account

The Summary Activity by Department Account view details the activity of department accounts by Date, Device, Network User, Transaction Type, Paper Size and Mobile Type.



You can configure the following filters.

Date	Select to display the activity by date.
Device	Select to display the activity by device.
Network User	Select to display the activity by network user.
Transaction Type	Select to display the activity by transaction type.
Paper Size	Select to display the activity by paper size.
Mobile Type	Select to display the activity by mobile type.

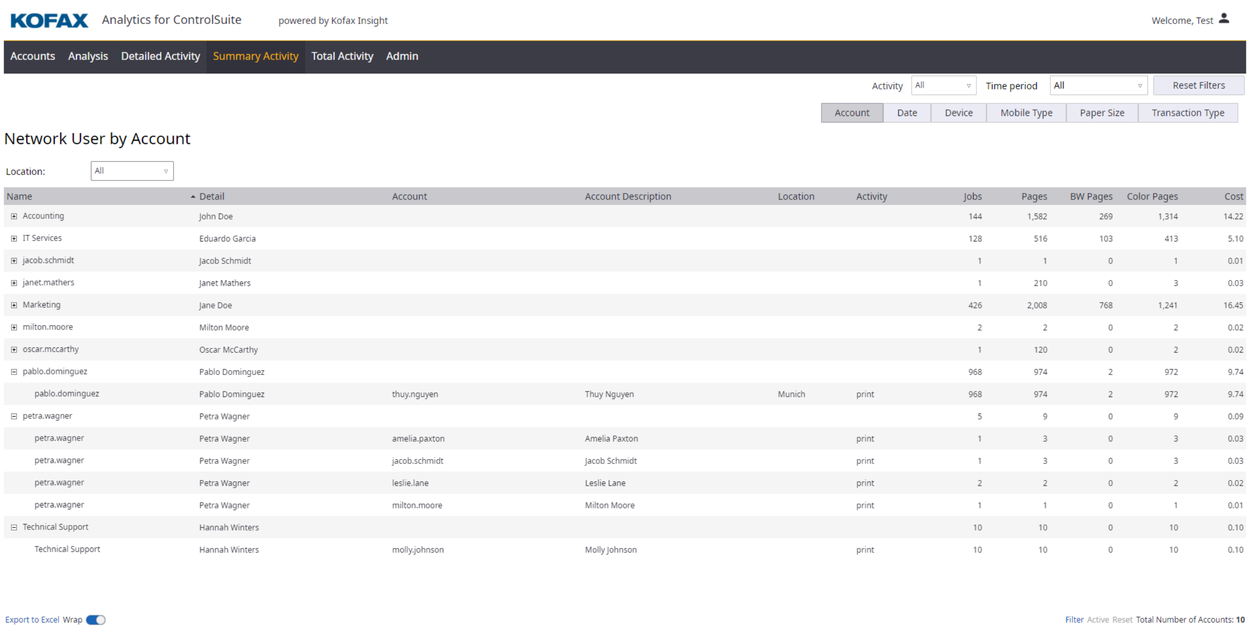
Data is grouped by department accounts and presented in a table with the following values.

Value	Description
Name	Department account's name.
Date	Date when the activity is performed. This value appears when you filter the view by Date.
Details	This value appears when you filter the view by Device, Mobile Type, Network User, and Paper Size.
Activity	Activity type. This value appears when you filter the view by Date, Device, Network User, Paper Size and Mobile Type.
User	User that performs the activity. This value appears when you filter the view by Network User.

Value	Description
Description	Details of the activity. This value appears when you filter the view by Device and Network User.
Transaction Type	Transaction Type. This value appears when you filter the view by Transaction Type.
Size	Paper size. This value appears when you filter the view by Paper Size.
Mobile Print Type	Mobile Print Type. This value appears when you filter the view by Mobile Type.
Jobs	Number of jobs the account releases during the selected time period.
Pages	Number of pages the account releases during the selected time period.
BW Pages	Number of black and white pages the account releases during the selected time period.
Color Pages	Number of color pages the account releases during the selected time period.
Cost	Total cost the account consumes during the selected time period.

Network User

The Summary Activity by Network User view details the activity of network users by Account, Date, Device, Transaction Type, Paper Size and Mobile Type.



You can configure the following filters.

Account	Select to display the activity by account.
Date	Select to display the activity by date.
Device	Select to display the activity by device.
Transaction Type	Select to display the activity by transaction type.
Paper Size	Select to display the activity by paper size.
Mobile Type	Select to display the activity by mobile type.
Location	• Select one or more locations from the list. • **All/Clear**: Displays data for all locations. Click again to clear all the selections. Click the Search icon to locate a certain location. Default filter is set to **All**.

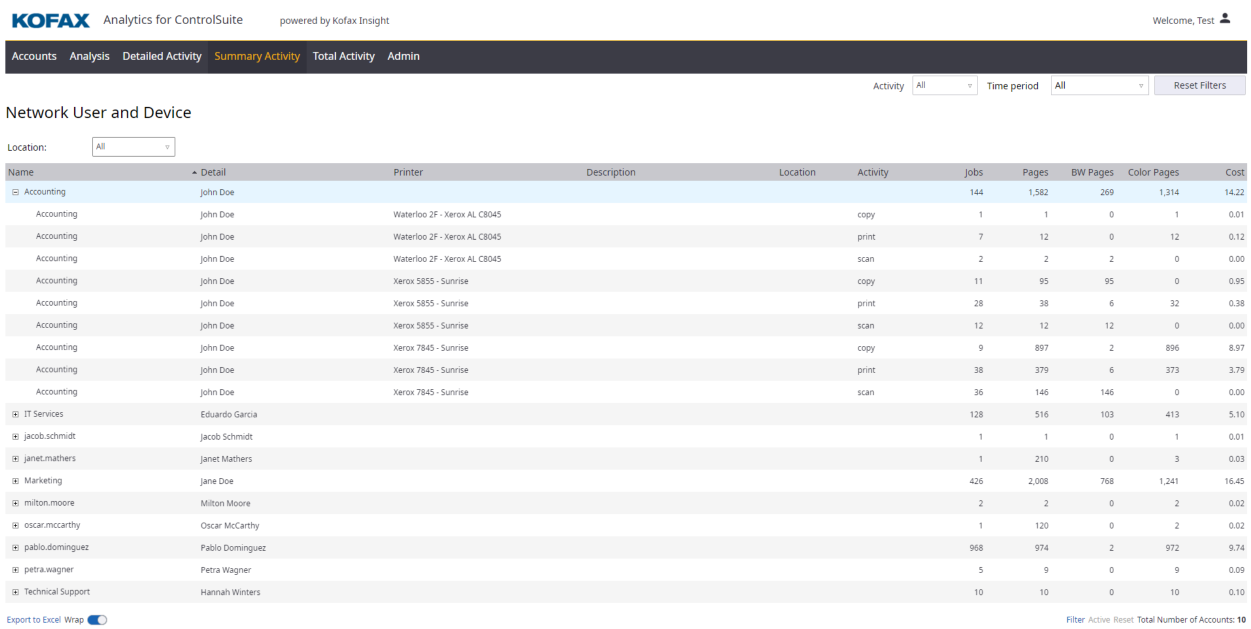
Data is grouped by billing code accounts and presented in a table with the following values.

Value	**Description**
Name	Network user's name.
Detail	Network user's detail.
Account	Account that performs the activity. This value appears when you filter the view by Account.

Value	Description
Account description	Details of the account. This value appears when you filter the view by Account.
Location	Location associated with the account.
Date	Date when the activity is performed. This value appears when you filter the view by Date.
Printer	Device that performs the activity.
Activity	Activity type. This value appears when you filter the view by Account, Date, Device and Paper Size.
Description	Details of the activity. This value appears when you filter the view by Device.
Transaction Type	Transaction Type. This value appears when you filter the view by Transaction Type.
Size	Paper size. This value appears when you filter the view by Paper Size.
Mobile Print Type	Mobile Print Type. This value appears when you filter the view by Mobile Type.
Jobs	Number of jobs the account releases during the selected time period.
Pages	Number of pages the account releases during the selected time period.
BW Pages	Number of black and white pages the account releases during the selected time period.
Color Pages	Number of color pages the account releases during the selected time period.
Cost	Total cost the account consumes during the selected time period.

Network User and Device

The Summary Activity by Network User and Device view details the activity of network users by Account, Date, Device, Transaction Type, Paper Size and Mobile Type with further information on the printer that are used for each activity.



You can configure the following filter.

Location	• Select one or more locations from the list. • **All/Clear**: Displays data for all locations. Click again to clear all the selections. Click the Search icon to locate a certain location. Default filter is set to **All**.

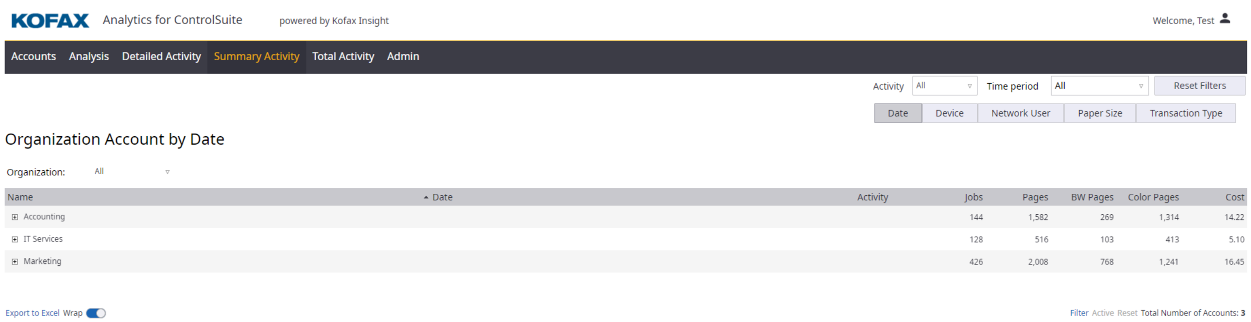
Data is grouped by network user and device and presented in a table with the following values.

Value	Description
Name	Network user's name.
Detail	Network user's detail.
Printer	Device that performs the activity.
Description	Details of the activity.
Location	Location associated with the account.
Activity	Activity type.
Jobs	Number of jobs the account releases during the selected time period.
Pages	Number of pages the account releases during the selected time period.
BW Pages	Number of black and white pages the account releases during the selected time period.
Color Pages	Number of color pages the account releases during the selected time period.

Value	Description
Cost	Total cost the account consumes during the selected time period.

Organization Account

The Summary Activity by Organization Account view details the activity of organization accounts by Date, Device, Network User, Transaction Type and Paper Size.



You can configure the following filters.

Date	Select to display the activity by date.
Device	Select to display the activity by device.
Network User	Select to display the activity by network user.
Transaction Type	Select to display the activity by transaction type.
Paper Size	Select to display the activity by paper size.
Organization	• Select one or more organizations from the list. • **All/Clear**: Displays data for all organizations. Click again to clear all the selections. Click the Search icon to locate a certain organization. Default filter is set to **All**.
User ID	The User ID filter is available from the Organization Account by Network User view. • Select one or more user IDs from the list. • **All/Clear**: Displays data for all user IDs. Click again to clear all the selections. Click the Search icon to locate a certain user ID. Default filter is set to **All**.

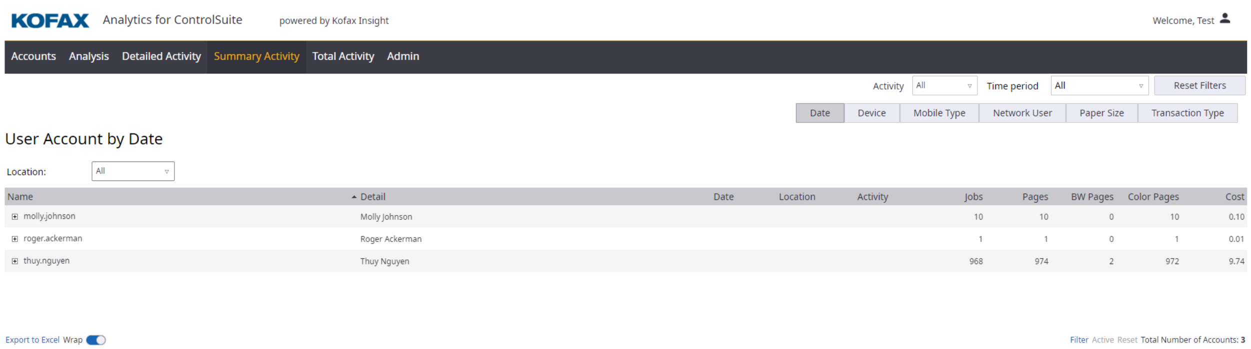
Data is grouped by organization accounts and presented in a table with the following values.

Value	Description
Name	Organization account's name.

Value	Description
Date	Date when the activity is performed. This value appears when you filter the view by Date.
Activity	Activity type. This value appears when you filter the view by Date, Device, Network User and Paper Size.
Printer	Device that performs the activity. This value appears when you filter the view by Device.
User	User that performs the activity. This value appears when you filter the view by Network User.
Description	Details of the activity. This value appears when you filter the view by Device and Network User.
Transaction Type	Transaction Type. This value appears when you filter the view by Transaction Type.
Size	Paper size. This value appears when you filter the view by Paper Size.
Jobs	Number of jobs the account releases during the selected time period.
Pages	Number of pages the account releases during the selected time period.
BW Pages	Number of black and white pages the account releases during the selected time period.
Color Pages	Number of color pages the account releases during the selected time period.
Cost	Total cost the account consumes during the selected time period.

User Account

The Summary Activity by User Account view details the activity of user accounts by Date, Device, Network User, Transaction Type, Paper Size and Mobile Type.



You can configure the following filters.

Date	Select to display the activity by date.
Device	Select to display the activity by device.
Transaction Type	Select to display the activity by transaction type.
Paper Size	Select to display the activity by paper size.
Mobile Type	Select to display the activity by mobile type.
Location	• Select one or more locations from the list. • **All/Clear**: Displays data for all locations. Click again to clear all the selections. Click the Search icon to locate a certain location. Default filter is set to **All**.
User ID	The User ID filter is available from the User Account by Network User view. • Select one or more user IDs from the list. • **All/Clear**: Displays data for all user IDs. Click again to clear all the selections. Click the Search icon to locate a certain user ID. Default filter is set to **All**.

Data is grouped by billing code accounts and presented in a table with the following values.

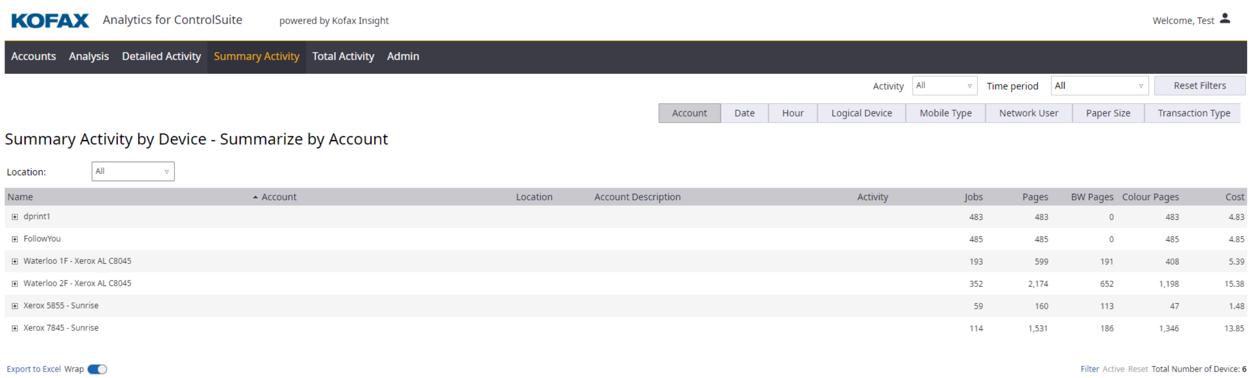
Value	Description
Name	User account's name.
Detail	User account's detail.
Date	Date when the activity is performed. This value appears when you filter the view by Date.
Location	Location associated with the account. This value appears when you filter the view by Date, Device, Network User, Transaction Type, Paper Size and Mobile Type.

Value	Description
Activity	Activity type. This value appears when you filter the view by Date, Device, Network User and Paper Size.
Printer	Device that performs the activity. This value appears when you filter the view by Device.
User	User that performs the activity. This value appears when you filter the view by Network User.
Description	Details of the activity. This value appears when you filter the view by Device and Network User.
Transaction Type	Transaction Type. This value appears when you filter the view by Transaction Type.
Size	Paper size. This value appears when you filter the view by Paper Size.
Mobile Print Type	Mobile Print Type. This value appears when you filter the view by Mobile Type.
Jobs	Number of jobs the account releases during the selected time period.
Pages	Number of pages the account releases during the selected time period.
BW Pages	Number of black and white pages the account releases during the selected time period.
Color Pages	Number of color pages the account releases during the selected time period.
Cost	Total cost the account consumes during the selected time period.

Summary Activity by Device

The Summary Activity by Device view is available from the **Summer Activity** menu. This view details the activity of each device by **Account**, **Date** and **Hour**, **Logical Device**, **Network User**, **Transaction Type**, **Paper Size** and **Mobile Type** over a certain period of time.

The data is displayed in real-time.



You can configure the following filters.

Account	Select to filter the activity by account.
Date	Select to filter the activity by date.
Hour	Select to filter the activity by hour.
Logical Device	Select to filter the activity by logical device.
Network User	Select to filter the activity by network user.
Transaction Type	Select to filter the activity by transaction type.
Paper Size	Select to filter the activity by paper size.
Mobile Type	Select to filter the activity by mobile type.
Location	• Select one or more locations from the list. • **All/Clear**: Displays data for all locations. Click again to clear all the selections. Click the Search icon to locate a certain location. Default filter is set to **All**.
Device	The Device filter is available from the Summary Activity by Device - Summarize by Network User view. • Select one or more devices from the list. • **All/Clear**: Displays data for all devices. Click again to clear all the selections. Click the Search icon to locate a device. Default filter is set to **All**.

Data is grouped by devices and presented in a table with the following values.

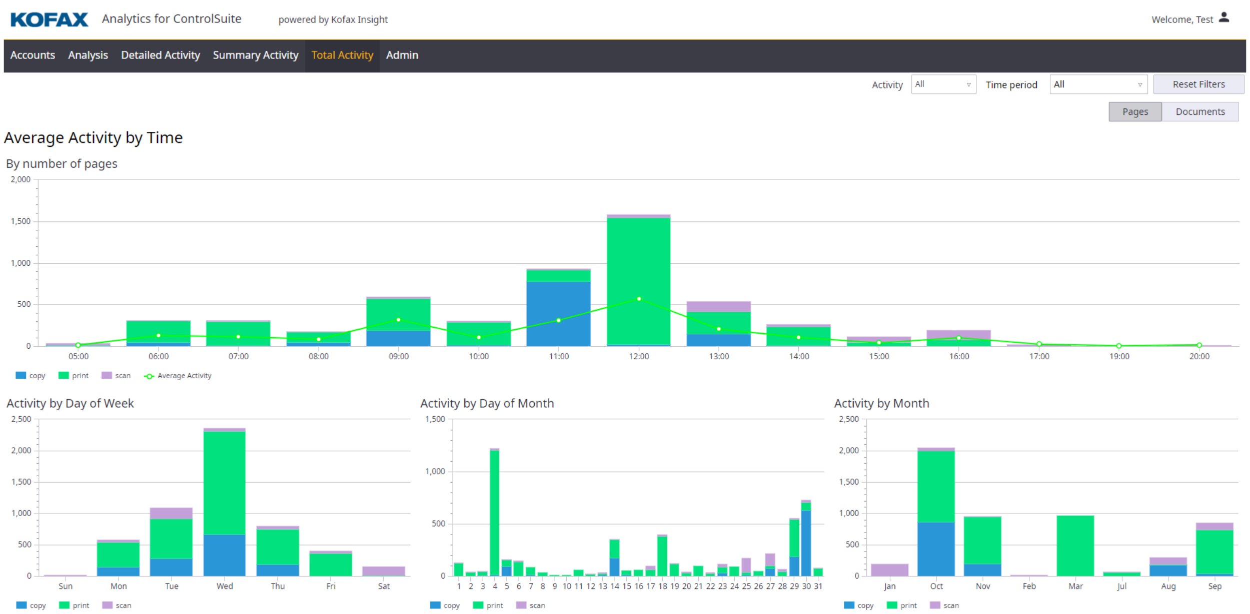
Value	**Description**
Name	Device name.
Account	Account that performs the activity. This value appears when you filter the view by Account.

Value	Description
Account description	Details of the account. This value appears when you filter the view by Account.
Location	Location associated with the account.
Date	Date when the activity is performed. This value appears when you filter the view by Date.
Hour Location	This value appears when you filter the view by Hour.
Printer	Device that performs the activity. This value appears when you filter the view by Logical Device.
User	User that performs the activity. This value appears when you filter the view by Network User.
Activity	Activity type. This value appears when you filter the view by Account, Date, Hour, Logical Device, Network User and Paper Size.
Description	Details of the activity. This value appears when you filter the view by Logical Device, Network User.
Transaction Type	Transaction Type. This value appears when you filter the view by Transaction Type.
Size	Paper size. This value appears when you filter the view by Paper Size.
Mobile Print Type	Mobile Print Type. This value appears when you filter the view by Mobile Type.
Jobs	Number of jobs the account releases during the selected time period.
Pages	Number of pages the account releases during the selected time period.
BW Pages	Number of black and white pages the account releases during the selected time period.
Color Pages	Number of color pages the account releases during the selected time period.
Cost	Total cost the account consumes during the selected time period.

Average Activity by Time

The Average Activity by Time view is available from the **Total Activity** menu. This view displays graphs demonstrating the number of pages or document volume each activity has consumed during a certain period of time.

The data is displayed in real-time.



Below the main graph are three fixed graphs for **Average Activity by Day of Week**, **Average Activity by Day of Month** and **Average Activity by Month**.

You can configure the following filter.

Page/Documents	Select one of the following display preferences: • **Pages** to show data as total page volume. • **Document** to show data as total document volume. Default value is set to **Pages**.

Device Activity

The Device Activity view is available from the **Total Activity** menu. This view displays device activity by number of pages or document volume.

The data is displayed in real-time.

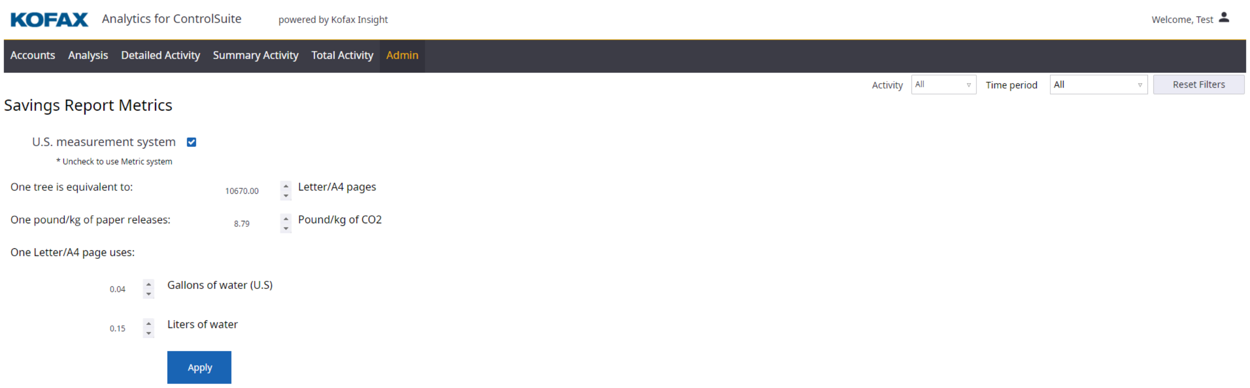
You can configure the following filter.

Page/Documents	Select one of the following display preferences: • **Pages** to show data as total page volume. • **Document** to show data as total document volume. Default value is set to **Pages**.
Location	• Select one or more locations from the list. • **All/Clear**: Displays data for all locations. Click again to clear all the selections. Click the Search icon to locate a certain location. Default filter is set to **All**.
Device Group	• Select one or more device groups from the list. • **All/Clear**: Displays data for all device groups. Click again to clear all the selections. Click the Search icon to locate a certain device group. Default filter is set to **All**.

Savings Report Metrics

The Savings Report Metrics view is available from the **Admin** menu. This view provides the configurations for the measurement system that is used in the Savings view.

This view is only available for the "kafcs admin" role.



To configure the measurement settings used in the Savings view, do the following.

1. Select U.S. or Metric measurement system:
   - Check the box to use the U.S. measurement system.
   - Clear the box to use the Metric measurement system.

   Default value is set to U.S. measurement system.
2. Enter the number of **Letter/A4 pages** that **One tree is equivalent to**.
3. Enter the **Pound/kg of CO2** that **One pound/kg of paper releases**.
   The volume unit depends on the measurement system used: U.S. (pound) or Metric (kilogram).
4. Enter the **Gallons/Liters of water** that **One Letter/A4 page uses**.
   The volume unit depends on the measurement system used: U.S. (gallon) or Metric (kilogram).
5. Click **Apply** to save and apply the settings.

Chapter 7

Dashboard Designer

The Dashboard Designer, a browser-based design canvas tool within Kofax Insight Studio, is used to create custom views. This tool offers components to help you build an effective, comprehensive set of dashboard views for Kofax Analytics for ControlSuite. Use the Dashboard Designer to:

- Reuse and combine dashboard components to display content in multiple views.
- Filter, aggregate or animate charts and grids to respond to data displayed in other charts.
- Customize templates to create specific user interactions and reports.

> Kofax Analytics for ControlSuite views are based on values from predefined Kofax records and metrics. When using the Dashboard Designer within Insight Studio to add custom views, do not modify the predefined views, records, or metrics that come with the product. Instead, you can make a copy of existing views and then customize the settings. With this approach, you can ensure that customizations are retained as product updates are applied in the future.

Assign the **kafcs designer role** to users who need to work with the Dashboard Designer (do not use the Administrator role). The kafcs designer role grants limited rights to Studio for the purpose of adding custom views, records, or metrics. This role grants read-only rights to the built-in views, records, and metrics delivered with the product and does not allow modifications to them. If you need full access to Insight Studio, an additional license is required.

For detailed information about the Dashboard Designer features, see the Insight Studio online help.

Access the Dashboard Designer

You access the Dashboard Designer by starting Insight Studio.

> The Dashboard Designer is not explicitly labeled within Insigth Studio; navigate to the Views area to design a dashboard (see Add a new view).

1. To access the Dashboard Designer, do one of the following:
   - Navigate to **Insight 6.x.x** > **Insight Studio**.
   - In a browser, enter the following URL:

     `http[s]://<server>:<port>/Insight/Studio/`

     where `<server>` is the name of your Insight server

     and `<port>` is included in the URL if the port differs from the default for HTTP (80) or HTTPS (443)

   Be sure to verify that the website's binding host name is set to blank or localhost in your IIS settings. Otherwise, a login error may occur.

2. Enter the login credentials for Insight Studio. Use the credentials for a user who is assigned to the kafcs designer role.

Add a new view

Use this procedure to create a new, empty view for your dashboard.

1. In Insight **Studio**, from the **Documents Tree**, click and expand **Views** > **Custom Views**, and select **New View**.
   The **New View** window appears.
2. Assign a name to the new view and click **OK**.
   The new view appears on the canvas.
3. Use the Dashboard Designer to design the view based on the applicable Kofax records and metrics.
   For detailed information about working with Dashboard Designer functions, see the Insight Studio online help.

Copy an existing view

Use this procedure to add a view based on a view that already exists. This procedure is useful for creating views based on the predefined, built-in Kofax Analytics for ControlSuite views, which cannot be edited. Save the copy in the **Custom Views** folder.

1. In Insight **Studio**, from the **Documents Tree**, click and expand **Views**.
2. Expand the applicable view folder, right-click the name of the view to copy, and then select **Copy**.
3. In the **Documents Tree** on the **Views** list, select the **Custom Views** folder, right-click and select **Paste**.
   The **New View Window** appears.
4. Assign a name to the new view and click **OK**.
   The new view appears on the canvas.
5. Use the Dashboard Designer functions to update the newly created view.
   For detailed information about working with Dashboard Designer functions, see the Insight Studio online help.

Chapter 8

Troubleshooting

The following sections introduce some good practices that you can apply to avoid problems during your performance.

Delete all previous data

After working with Kofax Analytics for ControlSuite for a period of time, you may notice that a high volume of data may accumulate, which can adversely impact system performance. If necessary, you can remove the data.

1. Navigate to **Insight** > **Studio** > **Tools** > **Publish and rebuild**.
2. Confirm the action when prompted. The **Publishing validation results** page appears.
3. Click **Continue Publishing** after the metadata is validated.

- The Equitrac Report data remains intact and can be reloaded into Insight.
- The One Time Plan needs to be executed again after the "Publish and rebuild" step since this step would make the project as clean as a newly installed one.

Prevent installation failure

The Kofax Analytics for ControlSuite installation fails if Kofax Insight is installed on the same website where the Equitrac Web Client already exists.

If you intend to install Kofax Analytics for ControlSuite on a ControlSuite server, make sure to specify a website that differs from the one used for Equitrac Web Client.