

# Kofax Analytics for Capture

## Release Notes

Version: 2.0.0.2

Date: 2017-10-13



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## Chapter 1

# About this release

The release notes contain late-breaking information about Kofax Analytics for Capture. Please read this document carefully, as it contains information that is not available in other documentation.

## Version information

This Kofax Analytics for Capture product is identified by build number 2.0.0.2.0.457, which is listed in the About window on the Kofax Analytics for Capture dashboard.

## System requirements

The primary source of information about Kofax Analytics for Capture requirements and dependencies on other products, including Kofax Capture and Kofax Transformation Modules, is the *Technical Specifications* document, which is available on the Kofax website at [www.kofax.com](http://www.kofax.com). The document is updated regularly, and we recommend that you review it carefully to ensure success with your Kofax Analytics for Capture product.

## Important installation notes

This fix pack is intended as an update to Kofax Analytics for Capture 2.0 or 2.0.0.1. If you are working with an earlier version of the product, you must upgrade to Kofax Analytics for Capture 2.0 before installing version 2.0.0.2.

This fix pack requires an upgrade to the Insight and Event Listener components. To ensure successful results, follow the instructions in [Install fix pack - update Kofax Insight](#) and [Install fix pack - update the Event Listener](#).

If you plan to use Kofax Analytics for Capture 2.0.0.2 with Kofax Capture 11, a Workflow Agent upgrade is also required if your organization requires the lowest possible number of queries on the Kofax Capture statistical database (see [Reduction in statistical database queries](#)). If not, you can continue to work with the same Workflow Agent used with Kofax Analytics for Capture 2.0 or 2.0.0.1.

## New features

This section lists the features introduced in Kofax Analytics for Capture 2.0.0.2.

## Enhanced fix pack installer

This Kofax Analytics for Capture fix pack requires an update to the Insight and Event Listener components. Significant usability improvements help to streamline the fix pack installation process, which you can perform interactively or silently. For details, see [Install fix pack - update Kofax Insight](#) or [Install fix pack - update the Event Listener](#).

## Support for Kofax Capture 11

Kofax Analytics for Capture 2.0.0.2 continues to support Kofax Capture 9 and 10.x and adds support for Kofax Capture 11. This section describes two enhancements that are available if you are using Kofax Analytics for Capture with Kofax Capture 11.

### Store user tracking and system statistics in separate databases

Kofax Capture 11 offers the ability to store user tracking statistics in a database that differs from the system database. If this feature is enabled, you must configure the Kofax Analytics for Capture Event Listener to connect to the appropriate system and statistical databases, as described in [Install fix pack - update the Event Listener](#).

For details about using the feature, see the *Kofax Capture 11 Release Notes* on the Kofax website at [www.kofax.com](http://www.kofax.com).

**Note** If the feature for storing statistics in a separate database is not enabled, you can use Kofax Capture 11 with an earlier version of Kofax Analytics for Capture.

### Update dashboard in real time for exported, deleted batches

If you are using Kofax Capture 11, an enhancement is available to ensure that dashboard data is updated in real time, as soon as batches are exported or deleted. This improvement ensures the accuracy of values for Total Batch Time and counts for batches, documents, and pages on the Batch Overview and Operations views. (895072)

The enhancement is available if the following conditions are met in the order listed here:

- Kofax Capture 11 is installed.
- The Kofax Analytics for Capture 2.0.0.2 Event Listener is installed.
- The Kofax Analytics for Capture 2.0.0.2 Workflow Agent is installed (must be installed after Kofax Capture 11).
- Batch classes are published or republished after the Workflow Agent is installed. If the Kofax Capture 11 Versions feature is used to select an earlier batch class version, it must be republished.
- Existing batches are processed after the Workflow Agent is installed.

If the preceding conditions are not met, dashboard data is updated the next time polling occurs after batches are exported or deleted. As a result, updates to the dashboard data for exported and deleted batches may be delayed.

## Reduction in statistical database queries

An enhancement to the Event Listener significantly reduces the number of Kofax Capture database queries required to identify user, module, and batch class names that appear on the Kofax Analytics for Capture dashboard views. This enhancement is available for all supported versions of Kofax Capture. If you are working with Kofax Capture 11, the number of queries can be reduced further if you install the Kofax Analytics for Capture 2.0.0.2 Workflow Agent. See [Install fix pack - update the Workflow Agent](#). (891263)

## Query updated to support partial deletion of field data

The "Delete Fields Older Than" query now supports the ability to delete field data incrementally. This approach prevents timeouts, which can occur during a field deletion operation if the number of records in the HistoryOfField table is significantly high. (894293)

## New elements introduced to Event Listener Web.config file

Two elements are new to the Event Listener Web.config file.

Element	Description
KCFinalizationHourlyCheckTime	Default = 0 The Event Listener uses an hourly interval to poll for finalized session data, and this value determines the exact time that polling occurs. Set the value to the number of minutes past the hour (from 0 to 59) when polling should occur. Use the default value of "0" to perform polling at the top of every hour. (963093)
KCDBReadAdminInterval	Default = 3600 (1 hour) Defined in seconds, an interval of time that has to pass for the Event Listener to poll the Kofax Capture database for module description data.

## Dashboard Enhancements

### Event Listener tab added to Systems view

On the Kofax Analytics for Capture dashboard, select **Admin > Systems** and use the **Listeners** tab to view a list of all Event Listener instances in your installation. The tab lists details for each Event Listener instance:

- Version number: Currently installed version of the Event Listener.
- Machine name: Machine name associated with the Event Listener instance.
- URL: Host name or IP address of the computer where the Event Listener is running.
- Status: Status of the Event Listener based on the most recent session that was processed.
- Last run: Most recent time that the Event Listener reported any activity.
- Turf: Subset of batch hash keys (0 to 99) that the Event Listener will process.

Based on the information listed, you can identify any Listener that may require an update to support the current Kofax Analytics for Capture features.

## Search function added to global filters

A search capability is now available for global filters such as the Batch Class filter. After selecting the filter, click the magnifying glass icon to display an entry field where you type the search text. For example, if you have a lengthy list of batch classes, type T to display the filters that start with the letter T. (884886)

## Install fix pack - update Kofax Insight

Use this procedure to apply the fix pack to your Kofax Insight installation.

As another option, you can perform a [silent installation](#) to apply the fix pack to Insight.

Upon successful completion of this fix pack, your Insight installation is updated to version 5.4.0.13, and your Kofax Analytics for Capture project is updated to version 2.0.0.2.

1. Verify that you have Administrator rights, and do the following:
  1. Close Kofax Insight.
  2. Temporarily disable User Account Control (UAC).
  3. Temporarily disable your antivirus software.
2. Copy the compressed Kofax Analytics for Capture product file, KofaxAnalyticsForCapture-2.0.0.2.ZIP, into a folder and extract the contents. Do not use a shared network folder.
3. Copy the entire contents of the Kofax Insight folder provided with this fix pack to the computer where the existing instance of Insight is installed.
4. Run **KAFC\_Installer.exe** as an Administrator.
5. If prompted, enter the login credentials for the Insight Administrator. Or, if using Windows Authentication in Insight, log in as a user that is mapped to the Insight Administrator role.
6. When the Insight Fix Pack Installation screen appears, use the **Project Name** list to select the name of your existing Kofax Analytics for Capture 2.0 or 2.0.0.1 project.
7. Click **Install** to start the fix pack installation.

While the installation is in progress, the status is listed in the **Results** box. The installation log file is available here:

```
C:\Temp\SetupInsight_YYYY.MM.DD.log
```
8. When notified that the installation is completed, click **OK** to clear the message and exit the installer.
9. Do the following:
  1. Enable User Account Control (UAC).
  2. Enable your antivirus software.

## Update Insight silently

Use this procedure to perform a silent installation to apply the fix pack to Insight.

1. Verify that you have Administrator rights, and do the following:
  1. Close Kofax Insight.
  2. Temporarily disable User Account Control (UAC).
  3. Temporarily disable your antivirus software.
2. Copy the compressed Kofax Analytics for Capture product file, KofaxAnalyticsForCapture-2.0.0.2.ZIP, into a folder and extract the contents. Do not use a shared network folder.
3. Copy the entire contents of the Kofax Insight folder to the computer where you plan to perform the Kofax Insight upgrade.
4. Edit **InstallerConfig.xml** to configure the parameters for the upgrade. The required parameters are listed in the file and the values are described here.

- **01: Insight Administration application credentials**

Required only when Windows authentication is not used for Insight Administration; used to validate the project name. Specify the credentials for the Administrator or other user who has access to Insight Administration.

Example:

```
<silent_insightlogin>ABCadmin</silent_insightlogin>  
<silent_insightpassword>ABCadminpassword</silent_insightpassword>
```

- **02: Project name**

The project contains the built-in views, records, and metrics for Kofax Analytics for Capture. Use the project name that you are currently using with version 2.0 or 2.0.0.1. This value is **case-sensitive** and must be spelled accurately. Otherwise, the upgrade cannot be completed successfully.

Example: `<silent_projectname>KAFC</silent_projectname>`

5. Verify that the required values are entered accurately, and then save **InstallerConfig.xml**.
6. Open a Command Prompt with elevated administrator privileges and execute the following command:

```
KAFC_Installer.exe /silent /config:InstallerConfig.xml
```

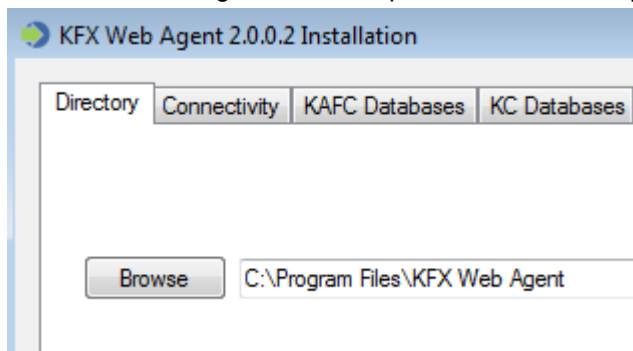
7. When the silent installation is finished, delete the following files:
  1. **InstallerConfig.xml** and all files used to run the silent installation.
  2. **Altosoft.Insight.InstallManager.log**, which contains the Administrator password.  
Path: `C:\Temp\Insight_5.4.0\Altosoft.Insight.InstallManager.log`
8. Do the following:
  1. Enable User Account Control (UAC).
  2. Enable your antivirus software.

## Install fix pack - update the Event Listener

Use the procedure in this section to upgrade or install the Event Listener Web service. In most cases, you will update existing Listener instances. If necessary, you can add a new Listener instance for high availability purposes or to support increased processing volume.

As another option, you can perform a [silent installation](#) to upgrade the Event Listener.

1. Copy the entire contents of the Event Listener folder provided with this fix pack to the server where the existing Listener is currently installed, or the server where you plan to install a new instance of the Listener.
2. In the root folder containing your product files, run **KFXWebAgentSetup.exe** as an Administrator. The Kofax Web Agent installer opens to the **Directory** tab.



3. On the **Directory** tab, do one of the following:
  - **Upgrade:** The current path is detected and displayed, and you cannot change it. Click **Next**.
  - **New installation:** Click **Browse** to navigate to the folder where you want to install the Event Listener, or enter the path and click **Next**.

The **Connectivity** tab appears.

KFX Web Agent 2.0.0.2 Installation

Directory Connectivity **KAFC Databases** KC Databases

Protocol:

Web Sites:

Name	Bindings	Application Pool
<input checked="" type="checkbox"/> Default Web Site	*:80:	ASP.NET v4.0

User:   Use existing

Password:

4. On the **Connectivity** tab, select the protocol and one or more websites for installing the Event Listener along with the credentials required to communicate with the Workflow Agent. When performing an upgrade, you can continue with the same values or adjust them if necessary.
  1. **Protocol:** Select **http** or **https** to display the applicable list of preconfigured websites.
  2. **Websites:** Select the check box next to the website where you plan to install or upgrade the Event Listener. Select one website per Event Listener instance.
  3. Optional: Click **Select Application Pool**, and select from a list of application pools to associate with the selected website. Click **OK** to confirm the selection.

**Note** **Select Application Pool** is not available until you select a website.

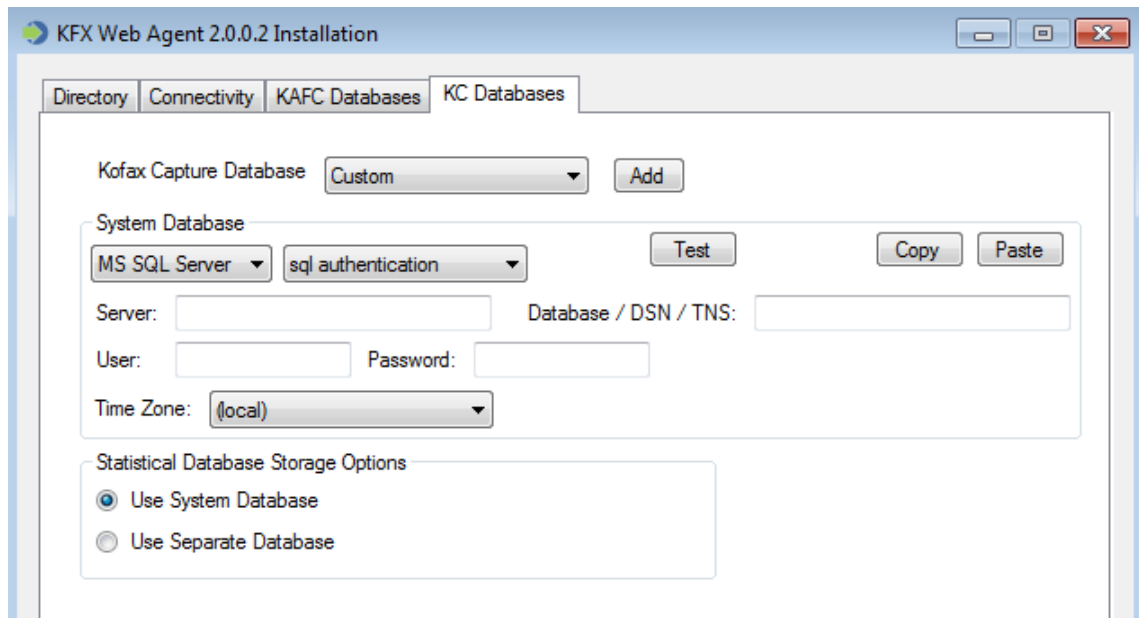
4. **User and Password:** Do one of the following to specify the credentials for authenticating the Workflow Agent. The credentials should be the same as the credentials that were set on the **Analytics** tab in the Kofax Capture Administration module during the Workflow Agent configuration.
  - **Upgrade:** Select **Use existing** to continue with the same credentials as before, or clear the check box and enter new values.
  - **New installation:** Set the credentials to authenticate the Workflow Agent when it connects to the Event Listener web service. If you install multiple instances of the Event Listener on different servers, be sure to specify the same credentials for each instance of the Listener.
5. Click **Next**.

The **KAFC Databases** tab appears.

The screenshot shows the 'KFX Web Agent 2.0.0.2 Installation' window with the 'KAFC Databases' tab selected. The window contains two main sections for database configuration:

- Staging Database:** Includes a dropdown menu for 'MS SQL Server', a dropdown for 'sql authentication', a 'Test' button, and 'Copy' and 'Paste' buttons. Below are input fields for 'Server:', 'Database / DSN / TNS:', 'User:', and 'Password:'.
- Insight Data Database:** Includes a dropdown menu for 'MS SQL Server', a dropdown for 'sql authentication', a 'Test' button, and 'Copy' and 'Paste' buttons. Below are input fields for 'Server:', 'Database / DSN / TNS:', 'User:', and 'Password:'.

5. On the **KAFC Databases** tab, the existing values for the Staging and Insight Data databases are detected from your previous installation. If necessary, you can update the values as described here. On this tab, save time by using the Copy and Paste buttons to copy entries from one database group to another. After pasting the entries, adjust the values as necessary.
  1. In the **Staging Database** group, enter the authentication information required to connect to your staging database, and click **Test** to verify the connection.
  2. In the **Insight Data Database** group, enter the authentication information required to connect to the Data database, and click **Test** to verify the connection.
  3. Click **Next**.  
The **KC Databases** tab appears.



6. On the **KC Databases** tab, the existing values for the Kofax Capture database are detected from your previous installation. If necessary, you can update the values as described here.
  1. **Kofax Capture Database** drop-down list: If you are using the standard database, select a preset that corresponds to your version of Kofax Capture.  
Based on the preset selection, the appropriate values are applied in the System Database group. You may need to update location of the Kofax Capture database server.  
If you are not using the standard database, select **Custom** and manually enter the values for connecting to the Kofax Capture database.  
In a KCNS environment, specify the Kofax Capture database for the primary central site.
  2. In the **System Database** group, enter the authentication information required to connect to the Kofax Capture database, and click **Test** to verify the connection. Note that if you change the Kofax Capture database credentials later, the Event Listener must be updated.
  3. In the **System Database** group, select the time zone for the server where the Kofax Capture database resides. In a KCNS environment, use the time zone for the central site.
  4. In the **Statistical Database Storage Options** group, select one of the following:
    - **Use System Database:** System data and Statistical data for Kofax Capture are stored in the same database.
    - **Use Separate Database** (*for use with Kofax Capture 11 only*): System data and Statistical data for Kofax Capture are stored in separate databases. When selected, a Statistical Database group is added to the KC Databases tab. Use the authentication information required to connect separately to the statistical database, and click **Test** to verify the connection. Use the same credentials that are specified for the statistical database in the Kofax Capture Database Utility.

Statistical Database

MS SQL Server  Copy Paste

sql authentication

Server:  Database / DSN / TNS:

User:  Password:

- In a KCNS environment with alternate central sites, the Listener must be configured for the primary central site and all alternate central sites. In the **Kofax Capture Database** group, click **Add** to provide the required information for additional Kofax Capture databases at alternate central sites.

**Note** Verify that the version is consistent for each Kofax Capture database connection that you specify. The use of multiple Kofax Capture versions within the same installation is not supported. Once data is sent to the Event Listener, you can verify Kofax Capture versions for each central and remote site by checking the System information on the **Admin** tab in the Kofax Analytics for Capture Viewer.

- Click **Update** or **Install** to proceed with the update or installation. When the completion message appears, click **OK** to close the installer.

## Update the Event Listener silently

Use the procedures in this section to silently install the Event Listener. You need to configure the parameters in `KFXWebAgentSetup.exe.config` and then perform the silent installation from a Command Prompt window. Valid parameters and sample values are listed in the configuration file.

- Edit `KFXWebAgentSetup.exe.config` to configure the installation parameters.
  - Upgrade:** The only required setting is `<add key="SilentInstall" value="true" />`. You must replace "false" with "true" and then save the file.

To update other installation parameters for an existing instance of the Listener, uncomment and update any of the sample values provided in the configuration file. As a result, only the updated parameters are changed. For example, to change the websites and application pools used to host the web service, uncomment and update the following two lines in the configuration file:

```
<add key="WebSites" value="Default Web Site;Second Web Site"/>
```

```
<add key="AppPools" value="DefaultAppPool;ASP.NET v4.0"/>
```

- New installation:** Uncomment and edit all settings in the configuration file with one exception: If you are not using the option to maintain statistical data in a separate database, you can exclude the lines that start with "StatsKCDB." Save the configuration file. This approach is appropriate if you are adding a new instance of the Event Listener.
- Open a Command Prompt with elevated administrator privileges and execute the following command:

```
KFXWebAgentSetup.exe
```

The installation log file is available here by default:

```
C:\temp\KFXWebAgentInstall.log
```

You can change the log file path by updating the "LogFilePath" value in the configuration file.

3. After the installation is finished, delete KFXWebAgentSetup.exe.config.

## Install fix pack - update the Workflow Agent

Use the procedure in this section to install the Workflow Agent. As another option, you can [Install the Workflow Agent silently](#).

When upgrading an installation that includes a large number of workstations, you may decide to perform the Workflow Agent upgrade in phases. For example, you might leave the previous version of the Workflow Agent in place temporarily on some workstations while you are upgrading the others.

1. Verify that you have Administrator rights and that the minimum required versions of Kofax Capture and Kofax Transformation Modules are installed.
2. Close all modules and stop all services for Kofax Capture and Kofax Transformation Modules, including custom modules and services.
3. Uninstall the existing instance of the Workflow Agent.
4. Copy the entire contents of the Workflow Agent folder provided with this fix pack to the workstation where the existing Workflow Agent is currently installed, or the workstation where you plan to install a new instance of the Workflow Agent.
5. In the root folder containing your product files, run **KofaxCaptureEventSender.msi** as an Administrator.

The Workflow Agent Installation wizard appears.

If the installer detects that the required versions of Kofax Capture or Kofax Transformation Modules are not installed, a message appears. In this case, you cannot proceed with the installation until the requirements are met.

6. Click **Next** to start the installation.  
The license agreement window appears.
7. Review the license agreement, accept the terms, and click **Next**.
8. Click **Install**.  
The files are installed to your Kofax Capture `Bin` folder. You cannot change the destination.
9. When the installation is complete, click **Finish** to close the wizard.
10. Configure the Workflow Agent and specify the Kofax Capture fields to be sent to the Event Listener. For details, see *Configure the Workflow Agent in the Kofax Analytics for Capture 2.0 Administrator's Guide*.

### Install the Workflow Agent silently

Use the procedures in this section to silently install or uninstall the Workflow Agent on a Kofax Capture workstation.

Open a Command Prompt with elevated administrator privileges and execute the following command:

```
msiexec.exe -i "KofaxCaptureEventSender.msi" /q /L*V "C:\Temp\nKofaxCaptureEventSenderInstall.log"
```

## Uninstall the Workflow Agent silently

Open a Command Prompt with elevated administrator privileges and execute the following command:

```
msiexec.exe -x {DAF9CBDC-4984-428B-810B-0358AB0B6DC2} /q /L*V "C:\Temp\nKofaxCaptureEventSenderUninstall.log"
```

## Customization Deployment

When the installer is run on a Kofax Capture server installation, the following folder is created:

```
[ServerFiles]\Customization Deployment\KofaxAnalyticsForCaptureWorkflowAgent
```

**Note** If you are using the customization deployment service, the Workflow Agent is added to the deployment configuration and deployed according to the schedule.

## Chapter 2

# Resolved issues

This section lists previously reported issues that are resolved when you install Kofax Analytics for Capture 2.0.0.2. This fix pack is cumulative and includes the resolved issues that were introduced in version [2.0.0.1](#).

## Doc Type Previous values not accurate

After documents were moved, merged, or split in the Quality Control, Validation, or KTM Doc Review modules, the values for Doc Type Previous in the HistoryOfPage table did not reflect the modifications. (919537)

## Moved pages mistakenly reported as deleted

After pages were moved into a child batch, some pages in the parent batch were shown as deleted on the Batch Events list, even though the pages were not actually deleted. (908698)

## Bullets in metric grid not refreshed

When a custom view with a metric grid using bullets was implemented, the bullets were not refreshed when a filter was applied. (905920)

## Count inaccurate on Extraction - Field Change Details

When Field Change Details was opened from the Extraction view, the count for Batches with Fields Changed was inaccurate. (901436)

## Data deleted for live batches

When the "Delete Data For" option was used on the Admin > Data Processing screen, data for live batches was not preserved. (901434)

## Extra documents shown on Document Workflow

The counts for some queue blocks on the Document Workflow view were not accurate. (899284)

## Counts not clearly displayed on bar charts, graphs

The counts on several bar charts and graphs were difficult to detect because the numbers in the foreground were nearly the same color as the background. (896351)

## Data mismatch on Swimlane, Workflow views

For batches that were created and deleted within the same session, the total batch count on the Swimlane and Workflow views did not match the number of batches listed in the drill-down charts for the respective views. For example, if the total batch count for the Batch Swimlane was 5, the drill-down chart may have listed the count as 10 batches. (889410)

## Some batch creation events excluded from Batch Overview

For batches that were created and deleted within the same scan session, the batch creation event was excluded from the Batch Overview, even though the batch deletion event, along with the session start and end time, were reported accurately. (696600)

## Split document not reflected on Batch Overview

After a document was split, events related to the newly created documents were listed incorrectly on the Batch Overview as delete and merge events, respectively. (662493)

## Resolved Issues in Kofax Analytics for Capture 2.0.0.1

This update includes the issues that were resolved in Kofax Analytics for Capture 2.0.0.1.

### Document Trending and Stats view included inaccuracies

On the Document Trending and Stats view, the Avg Docs by Module chart did not reflect the correct number of documents over time. Also, the Doc Type filter was not applied to the Avg Docs by Module chart. (890858)

## Data Processing: 'Delete Fields Older Than' could not be edited

On the Admin tab in the Kofax Analytics for Capture dashboard, the default value (30 days) for Delete Fields Older Than could not be updated. (890214)

## Chapter 3

# Known issues

This section describes issues that you may encounter while using Kofax Analytics for Capture 2.0.0.2. Workarounds are provided, as applicable.

## Date filter not applied to unfinished batches, documents

On the Batch Workflow and Document Workflow views, the global date filter does not affect the transition counts for batches and documents that are still in progress. The global date filter applies only to finished batches and documents. (975290)

## Error after removing 2.0.0.2 Workflow Agent and restoring version 1.2.x

If you uninstall the version 2.0.0.2 Workflow Agent, and then install a version 1.2.x Workflow Agent, the following error appears when you start the Administration module:

```
The following custom components cannot be found or are not registered with Kofax Capture:
```

```
KofaxAnalytics.CaptureSetupGeneral
```

```
KofaxAnalytics.CaptureSetupWfa
```

This error does not occur if you uninstall the version 2.0.0.2 Workflow Agent and then install the version 2.0.0 Workflow Agent. (974825)

**Workaround:** To prevent the error, uninstall the 2.0.0.2 Workflow Agent and install the version 1.2.x Workflow Agent in this order:

1. Process all batches.
2. Use the Administration module to unassign the 2.0.0.2 Workflow Agent from the applicable batch classes.
3. Uninstall the 2.0.0.2 Workflow Agent.
4. Install the version 1.2.x Workflow Agent.
5. Use the Administration module to assign the 1.2.x Workflow Agent to the applicable batch classes.

## Total Batch Time reduced after session is finished

If you export or delete a batch in Kofax Capture 11, and then open the Batch Overview while final calculations for the session are still in progress, an unofficial Total Batch Time value is listed with a notation of *Finalizing*. Once the calculations for the session are finished, the *Finalizing* notation is cleared, and the Total Batch Time value is updated and sometimes reduced. For example, it is possible that the Total Batch Time value would change from 01:18 while a session is in progress, to 01:13 after all calculations are final. (922326)

## Version not listed in About box after upgrade

In some cases, the product version and build number do not appear in the About box in the Kofax Analytics for Capture dashboard after an upgrade to version 2.0.0.2. (908821)

**Workaround:** Run the One Time Plan. After the plan is successfully completed, the version number appears in the About box.