Kofax Analytics for TotalAgility
Administrator's Guide

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KOFAX

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Preface

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

Kofax Analytics for TotalAgility documentation

To access the full documentation set online, see the Kofax Analytics for TotalAgility Documentation page.

To launch the product features for the installed version of the product, click the Help icon ❷ in the application.

A complete set of Kofax Analytics for TotalAgility documentation includes the following items.

Guide/Help	Description
Administrator's Guide	Describes the methods for installing or upgrading Kofax Analytics for TotalAgility. It also provides the configuration steps that are required to get started with the product.
Release Notes	Contains late-breaking information that may not be included in other Kofax Analytics for TotalAgility documentation.
Technical Specifications	Provides technical specifications specific to Kofax Analytics for TotalAgility 1.5.0.
Kofax Insight Documentation	The product documentation for Kofax Insight 6.5.0 is hosted online.

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

To access the Kofax Knowledge Portal, go to https://knowledge.kofax.com.

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

The Kofax Knowledge Portal 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.

  To locate articles, go to the Knowledge Portal home page and select the applicable Solution Family for your product, or click the View All Products button.

From the Knowledge Portal home page, you can:

- Access the Kofax Community (for all customers).

  On the Resources menu, click the **Community** link.
- Access the Kofax Customer Portal (for eligible customers).

  Go to the Support Portal Information page and click **Log in to the Customer Portal**.
- Access the Kofax Partner Portal (for eligible partners).

  Go to the Support Portal Information page and click **Log in to the Partner Portal**.
- Access Kofax support commitments, lifecycle policies, electronic fulfillment details, and self-service tools.

  Go to the Support Details page and select the appropriate article.

Chapter 1

Introduction

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

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

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

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

Chapter 2

Requirements

Before you install Kofax Analytics for TotalAgility, ensure your system meets the software and database listed in this chapter. For information about other products supported for use with Kofax Analytics for TotalAgility, see Kofax Analytics for TotalAgility Technical Specifications available on the Kofax Analytics for TotalAgility documentation page.

Software requirements

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

- Kofax Insight 6.4.0.2 or higher (see the *Kofax Insight Installation Guide* to install and configure Insight).
- Insight 6.4.0.2 license for Kofax Analytics for TotalAgility.
- Kofax TotalAgility 7.8.0 and higher (includes Kofax Reporting)

> ⓘ See the *Kofax TotalAgility Installation Guide* to install Kofax TotalAgility.

Databases

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

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

Configure the Installation Manager

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

    c. Click **OK**.

3. Create three databases.

> ℹ You can auto-create databases during project creation.

    a. KAFTA_Admin

    b. KAFTA_Meta

    c. KAFTA_Data

4. Create a user.

    a. Navigate to **Security** and right-click **Logins**.

    b. Click **New Login**.

    c. Select **SQL Server Authentication**.

    d. Enter a username for the user.

    e. Clear the **Enforce Password Policy**.

    f. Enter a password for the user.

    g. Select the **User Mapping** property of the new login and grant the **db_owner role** membership to the following databases.
- KAFTA_Admin
- KAFTA_Meta
- KAFTA_Data

> ℹ The preceding databases should use a SQL user with the db_owner role even if they are distributed across multiple servers. The db_owner role should also be applied to any SQL user assigned to the following TotalAgility data sources:
> - TotalAgility
> - TotalAgility_Finished
> - TotalAgility_Reporting (Kofax TotalAgility Reporting Database)
> - TotalAgility_<tenant_name> (for on-premise multi-tenant and Azure environments)

5. Click **OK**.

Enable Windows Authentication for Insight sites

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

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

1. In the IIS, drill down to the **Default Web Site**.

The following Insight sites are listed:
- DataFileProcessorService
- Insight and its subfolders
- WcfDataService

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

Use SSL

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

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

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

Import an SSL certificate

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

Enable SSL for Insight application

1. Open **Internet Information Services (IIS) Manager**.
2. Right-click the **Default Web Site** and click **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**.

   e. Close the **Site Bindings** dialog box.

4. Click Insight and click **SSL settings** on the **Features** tab.

    a. Select **Require SSL**.

    b. For Client Certificates, select **Accept** and click **Apply**.

Use the same time zone

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

Chapter 3

Install Kofax Analytics for TotalAgility

This chapter describes two methods for installing Kofax Analytics for TotalAgility.
- Silent installation
- Standard installation

> ℹ If you plan to install High availability for Kofax Analytics for TotalAgility, refer to *Kofax Insight Installation Guide*. You must refer to the correct documentation for the version of Kofax that you have installed.

Prerequisites:
- Download a copy of the Kofax InsightSetup installer from the Kofax website or obtain a link from your Kofax representative.
- Download the installer for the fix pack to get Kofax.
- Install Insight before you install Kofax Analytics for TotalAgility. See the *Kofax Insight Installation Guide*.
- Have a database account with administrator rights to auto-create the databases you need. If you do not have administrator rights, you must create the administrator database prior to installing Kofax. In this scenario, you define a user with database ownership rights.
- Before extracting KofaxAnalytics-1.5.0_For_TotalAgility.ZIP, unblock the file from the File Properties window.
- Extract the **KofaxAnalytics-1.5.0_For_TotalAgility.zip** folder on the server where Kofax is installed. Do not extract the Project_KAFTA-1.5.0.0 files.

Perform a silent installation

Use the silent installation method to install Kofax Analytics for TotalAgility 1.5.0 without any user interaction. After you edit the silent installation file, the installation proceeds without any user interaction.

> ℹ When you install Kofax Analytics for TotalAgility in silent mode, Kofax Insight is also installed.

1. From your Kofax Analytics for TotalAgility files, navigate to `\`
   `\KofaxAnalytics-1.5.0_For_TotalAgility\InstallTools\SilentInstall`.
2. Extract the contents of SilentInstall.zip into a folder.
3. Rename your Kofax Insight license file to `Altosoft.Insight.License.xml`.

4. Copy the renamed license file along with the following list of files to the same folder where you extracted SilenInstall.zip:
   - Project_KAFTA-1.5.0.0.zip
   - Insight 6.4 (or higher) setup *.msi file. For example, KofaxInsightSetup_6.4.0.0.0.626_x64.msi

   ℹ The installation folder name should match the version of Insight you are using.

   - Insight Patch setup *.msp file.
     Copy the patch setup file only if you need to install a patch. Kofax Analytics for TotalAgility requires KofaxInsight_6.4.0.2.0.661_x64.msp.
5. Use SETUP.bat to configure all the installation parameters. SETUP.bat is a standard Windows batch file with all valid parameters listed at the top. The following parameters are likely to be changed:

No.	Parameter	Description	Required
1	silent_installpath	Installation path for Insight. The installation folder name should match the version of Insight you are using.	Yes
2	silent_projectname	KAFTA project name. (Default: KAFTA)	Yes
3	silent_sqlserver	Microsoft SQL Server instance name.	Yes
	silent_user	Microsoft SQL Server username. If the values for [silent_user] and [silent_pass] are blank, Windows Authentication mode is used, and credentials for the Insight Scheduler Service are required.	No
	silent_pass	Microsoft SQL Server password. If the values for [silent_user] and [silent_pass] are blank, Windows Authentication mode is used, and credentials for the Insight Scheduler Service are required. ℹ If you use special characters to set a parameter in the .bat file, you must enclose the parameter value within quotation marks.	No
4	silent_data	KAFTA DATA database name	Yes
5	silent_meta	KAFTA META database name	Yes
6	silent_schedulerport	Insight Scheduler Service port (Default: 13501)	Yes
7	kafta_bundle_project	KAFTA project file (Default: Project_KAFTA-1.5.0.0.zip)	Yes
8	insightadmin_account	Insight Administrator username.	Yes

No.	Parameter	Description	Required
	insightadmin_password	Insight Administrator password. ℹ️ If you use special characters to set a parameter in the .bat file, you must enclose the parameter value within quotation marks.	Yes
9	silent_insightserviceaccount	The username for Insight Scheduler Service. This parameter is required if [silent_user] and [silent_pass] in parameter #3 are not specified and Windows Authentication mode is used. The account for Insight Scheduler Service must have "Log on as a service" right and should be able to access the databases including Insight Data, Insight Meta and TotalAgility databases.	No
	silent_insightservicepassword	The password for Insight Scheduler Service. This parameter is required if [silent_user] and [silent_pass] in parameter #3 are not specified and Windows Authentication mode is used. ℹ️ If you use special characters to set a parameter in the .bat file, you must enclose the parameter value within quotation marks.	No
10	silent_insight_setup_filename	Insight major version setup MSI file name prepared at step #4.	Yes
11	silent_insight_update_filename	Insight patch setup MSP file name prepared at step #4. If there is no requirement for the installation of patch, this parameter can be left blank.	No
12	new_data_retention_policy_confirmation	New data retention policy confirmation. The data retention policy is applied to the data and records. See the "Retention Policy" topic in the *Kofax Analytics for TotalAgility Product Features Guide* and then change the value of this parameter to **true**. (Default: false)	Yes

6. Update the `InstallManagerSettings.xml` to match the Insight installation settings. Use the template setting file in folder [configuration samples] to overwrite [InstallManagerSettings.xml] if needed. Refer to the *Insight Installation Guide* for more information.

7. Update the connectionString values in Settings.xml to match the TotalAgility database connection settings. Following are the sample connectionString values:

- SQL Server Authentication: `connectionString="Data Source=hostname;Initial Catalog=TotalAgility;User ID=sa;Password=password"`
- Windows Authentication: `connectionString="Data Source= hostname;Initial Catalog= TotalAgility; Integrated Security=SSPI"`

Perform a standard installation

To install Kofax Analytics for TotalAgility, you need the Kofax Insight Setup installer and the Project_KAFTA-1.5.0.0 (dashboard files within the Project folder).

1. Install Insight version 6.4.0.2 or higher.
2. Create a new KAFTA project using Project_KAFTA-1.5.0.0.zip.
3. Configure the database connections for TotalAgility and Reporting.
4. Run One Time Plan from beginning of times to current time.
5. Login to the Insight Viewer and do the following:

    a. Navigate to **Administration** > **Data Retention**.

    b. Review and make changes to the Field Data Retention and Old Data Retention if required.

    c. Click **Save** to save the changes.

    > ⓘ
    >
    > - Even if no changes are made, you must click Save to confirm the settlings are already reviewed; otherwise, the Hourly Execution Plan fails to run.
    > - The One Time Plan and Hourly Execution Plan fails if the retention policy is not set or following plans are not scheduled:
    >   - Delete Field Data per Retention Policy
    >   - Old Data Cleanup Plan

6. Navigate to **Start** > **All Programs** > **Insight** > **Data Loader**.
7. Click the **Data Load Module** tab and do the following:

    a. Select the **Save "To date" as the date of last successful load** check box.

    b. Under **Execution Plans**, select the plans to execute.
    - Run the **Hourly Execution Plan** from beginning of times to current time.
    - Run the **Minute Plan** from beginning of times to current time.

Kofax Analytics for TotalAgility project creation and configurations

This chapter provides the instructions for creating a Kofax Analytics for TotalAgility project and configuring Kofax Analytics for TotalAgility such as configuring database connection for the project, configuring user mapping for On-Premise Multi-Tenant environment, and more.

Configure TotalAgility connections

1. Navigate to Insight **Admin Console** > **Connections** > **TotalAgility**.
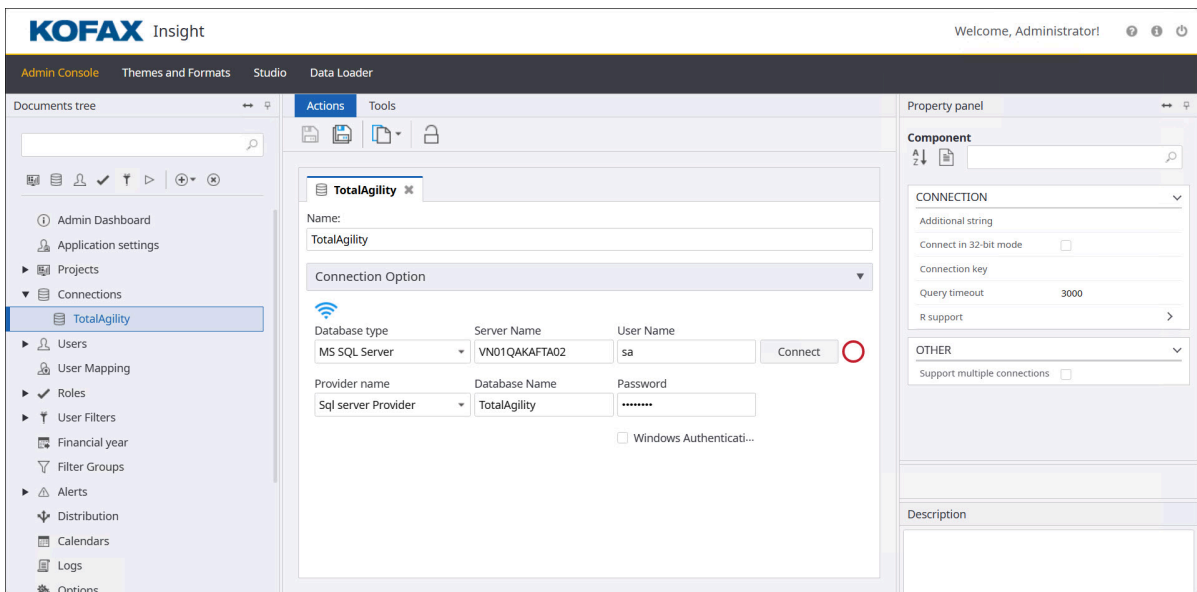
2. Enter the details as provided for the TotalAgility Main database.
3. Click **Connect** to verify the TotalAgility database connection.
4. Click **Save**.

Create a Kofax Analytics for TotalAgility project

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

1. Navigate to **Start** > **All Programs**> **Insight** > **Admin Console**.

2. On the **Documents tree**, right-click **Projects** and select **New Project**.
3. In the **New Project** pop-up, enter KAFTA (suggested project name) and click **OK**.
4. In the **Create New Project** [project name] window, click the **Import from file** tab.
5. To select the Kofax Analytics for TotalAgility project file, do the following:

    a. Click the ellipsis adjacent to the **Select file** box.
       The Open file pop-up appears.

    b. Select either option:
       - **File is located on the client computer and will be copied to the server for processing**: Allows you to select the Project_KAFTA-1.5.0.0.zip file from the Project folder on your local machine.
       - **File is located on the server**: Allows you to select a file from the server.

    c. Click **OK**.
6. Select the Database type, Server Name, User Name, and login credentials to access the KAFTA_Meta and KAFTA_Data databases.
7. Click **Connect** to test if the connection to the databases is established.

   > ⓘ The connection will fail if these databases do not exist.

8. Click **OK** to create a project.
   A confirmation pop-up appears.
9. To create a new database or update a pre-existing database, click **Yes** in the confirmation pop-up. Otherwise, the Meta and 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 database connections for the project

1. Login to Insight Admin Console and navigate to **Documents tree** > **Projects** > **KAFTA**.
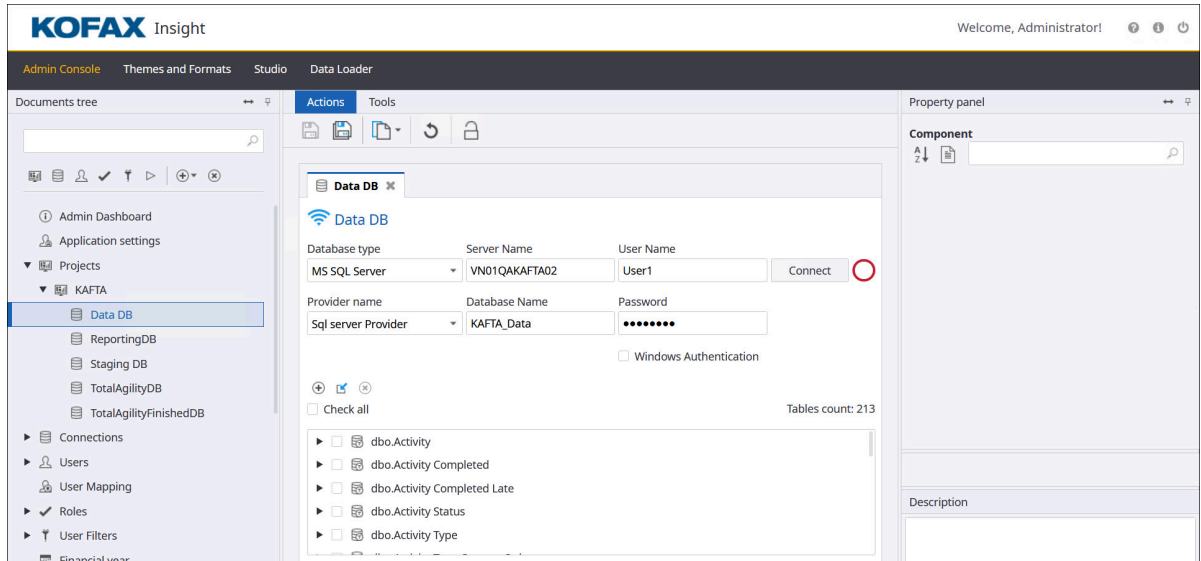
2. Click **Connect** to verify the Data database connection.

3. Similarly, enter or verify the connections for ReportingDB, TotalAgilityDB and TotalAgilityFinishedDB.

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

4. Click **Save**.

Potential database connection values

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

For On-Premise

	Data database	**Reporting and TotalAgility databases**
Server Name	KAFTA-DB (DB Server hosted locally)	KTA-DB
User Name	tester (this user has the privileges defined in the guide)	tester (this user has the privileges defined in the guide)
Database name	KAFTA_Data	TotalAgility_Reporting, TotalAgility, TotalAgility_Finished

	Data database	Reporting and TotalAgility databases
Password	xyz1	xyz1

For On-Premise Multi-Tenant

	Data database	Reporting and TotalAgility databases
Server Name	Insight-DB (DB Server hosted locally)	OPMT-KTA (Database Server hosted locally)
User Name	tester	tenant1_live (This user is created during tenant creation. This user maps directly to the _live schema, which contains both TotalAgility and Reporting information.)
Database name	KAFTA_Data	TotalAgility_tenant2 (one database instance is deployed in Azure with multiple schemas: _live, _dev, _reportingstagingdev, _reportingstaginglive_, simulatorlive, simulatordev).
Password	xyz1	kA2B1746214XXXXXXXXXF3833333335 (password generated during tenant creation)

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

Configure TotalAgility processes

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

1. Log on to Kofax TotalAgility Designer.
2. Navigate to **Workflow** > **Business processes**.
   The **Business processes** list page appears.
3. Open the required process map.
4. On the properties panel, click the **History, reporting and execution** tab.
5. In the **Reporting** group, select **Include in analytics**.
6. Click **Save**.

Best practices to maximize performance

This section describes the best practices to help improve the performance of Kofax Analytics for TotalAgility including the performance of the Kofax Analytics for TotalAgility Data databases, Kofax TotalAgility databases and TotalAgility Reporting databases.

- Use a dedicated database server for Kofax Analytics for TotalAgility separate from the TotalAgility database servers.

- As Kofax Analytics for TotalAgility queries the data from TotalAgility and Reporting databases, ensure the following:
  - Follow the Kofax TotalAgility best practices for the TotalAgility and Reporting databases. See the *Kofax TotalAgility Best Practices Guide*.
  - Configure the Kofax TotalAgility retention policies appropriately to manage the database growth. See the *Kofax TotalAgility Designer Help*.
- Size the database server CPU, memory, and storage appropriately for the Kofax Analytics for TotalAgility Data database.
- Configure Insight to send an email notification when data load fails. After receiving a notification, run the execution plan manually for the failed date range.

  > ℹ️ If you are not able to resolve the errors that occurred upon running the execution plan promptly, you may need to modify the field retention period and document retention period in Kofax TotalAgility to avoid data loss.

- The database size may increase significantly over time resulting in reduced performance and manageability. We recommend you execute the retention policies to ensure that unwanted data is deleted and essential data is retained.
  - The database size may increase significantly over time resulting in reduced performance and manageability. We recommend that you configure and review the retention policy settings on the **Administration > Data Retention** view to ensure the unwanted data is deleted, and essential data is retained. These settings may vary based on factors such as the capacity of your database server and the volume of data being processed. We recommend that you evaluate your specific needs and adjust the retention policy accordingly and schedule it to run outside of peak usage hours, such as overnight or over the weekends to avoid any disruptions to normal operations. For more information on retention policy settings, see the *Kofax Analytics for TotalAgility Product Features Guide*.
  - Review the "Include in Analytics" settings on each process in the Kofax TotalAgility Designer to only send data for processes that require analytics.
- As the field data records contribute to the size of the Kofax Analytics for TotalAgility Data database, minimize the growth and monitor the size of the [Field Fact] table.
  - Review the "Include in Analytics" settings on each document type in Kofax TotalAgility Designer to only send fields that are required.
  - Specify the minimum number of days that field details are required in the Kofax Analytics for TotalAgility data retention policy and make sure the period does not exceed one to two months.

    > ℹ️ These settings may vary based on factors such as the capacity of your database server and the volume of data being processed. We recommend that you evaluate your specific needs and adjust the retention policy accordingly.

  - As the field data is aggregated and typically used only for the detailed views, in most cases, the retention period for field data can be set to a shorter duration than other data types, as it is not as critical for long-term analysis or decision-making. Evaluate your organization's specific needs and usage patterns to determine an appropriate retention period for field data that balances the need for detailed views with optimal system performance and data management practices.

- The document details may be partially displayed in the Document Overview view if the data is deleted by the Field Data Retention policy. We recommend that you review and set the retention policies for your documents.
- Contact your database administrator to regularly monitor the size of the [Field Fact] table. This will help ensure that the table does not grow very large and impact system performance.
- To enhance the query performance and decrease resource usage, follow the recommended index maintenance procedures for SQL Server. This can entail various tasks such as updating statistics, reorganizing, or rebuilding the index. Consider rebuilding indexes that exhibit fragmentation_in_percent greater than 25%.
- All the currently supported versions of SQL server offer maintenance of indexes online. If you decide to avail of this facility, consider the following attributes, as they affect the performance of Kofax Analytics for TotalAgility:
  - Server resource utilization increases (Memory, Disk IO) to complete the rebuild. The extra reads and writes are attributed to the second copy of the index that SQL Server creates during the initial phase of the index rebuild.
  - Clustered indexes create duplicate copies of both the index and the data until the rebuild is complete, affecting performance on concurrent table activity. Non-clustered indexes marginally affect resource utilization.
  - Transaction logs grow substantially, attributed to the higher frequency of REDO entries.
  - Increased locking during the preparation and build phase ensures that other processes do not get an exclusive lock on the object while the index is being rebuilt.
  - The last lock acquired, a schema modification lock (Sch-M lock), blocks all other concurrent access to the table (while the old index is dropped, and the metadata updated).
- In the SQL Server, under **Server Properties**, on the **Advanced**, under Parallelism, set **Cost Threshold for Parallelism = 35**.
- Under **Object Explorer**, expand Databases. On the context menu of each TotalAgility database, in the **Database Properties** window on the **Options** tab, set the following properties:
  - Under **Automatic**, set **Auto Update Statistics Asynchronously** to **True**.
  - Under **Miscellaneous**, set **Is Read Committed Snapshot On** to **True**.
- Under **Database Scoped Configurations**, set the **MAX DOP** (Maximum Degree of Parallelism) of the SQL Server or the Kofax Analytics for TotalAgility databases based on the Microsoft recommendation for the number of cores/CPUs on the database server.
- Consider your business requirements for updates to the Operations views and schedule the Minute Plan to run less frequently if your business needs allow.

Configure Kofax TotalAgility Web.config to point to the Insight Server

You must modify the TotalAgility web configuration file to point to the Insight server as follows:

1. Navigate to the Web.config file; `c:\Program Files\Kofax\TotalAgility \Agility.Server.Web\web.config`
2. Look for the following entries:

   <add key="InsightServerURL" value="" />

    <add key="InsightUserName" value="" />
    <add key="InsightPassword" value="" />

3. Provide the following values:

    <add key="InsightServerURL" value="http://127.0.0.1" />
    <add key="InsightUserName" value="kta" />
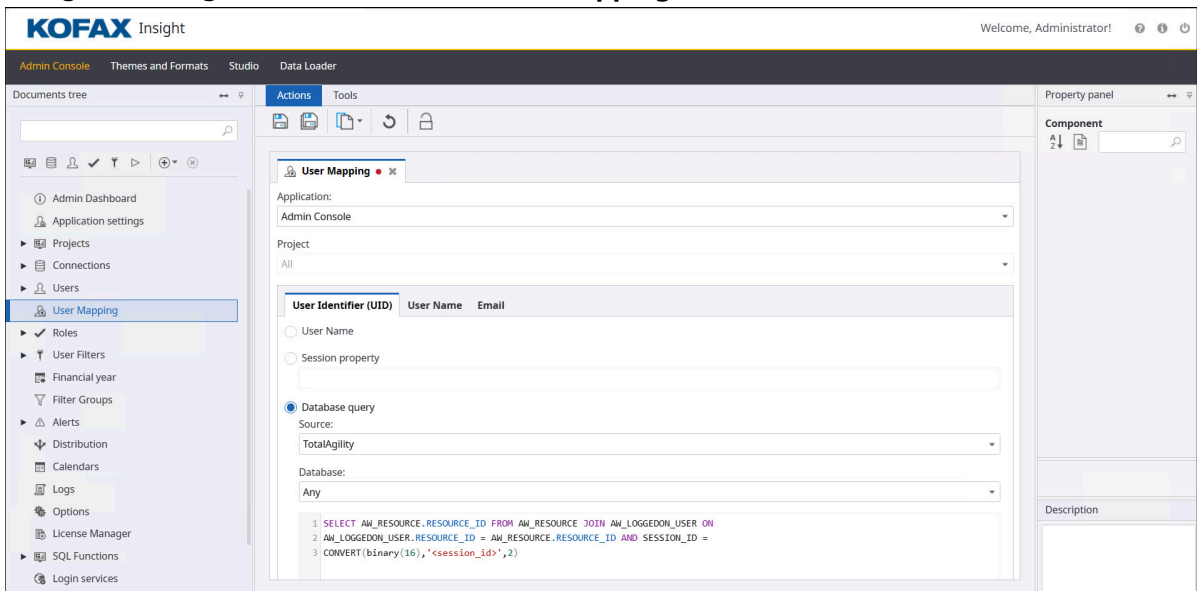   <add key="InsightPassword" value="kta" />

4. Click **Save**.

Configure user mapping for On-Premise Multi-Tenant

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

1. Navigate to Insight **Admin Console** > **User Mapping**.

2. Under the **User Identifier (UID)** section, do the following:

    a. Select **Database query**.

    b. On the **Source:** list, select **TotalAgility**.

    c. Enter the following SQL query:

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

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

3. Click the **User Name** and tab do the following:

   a. Select **Database query**.

   b. On the **Source** list, select **TotalAgility**.

   c. On the **Database** list, select a database.

   d. If connecting to the Live Schema in the On-Premise Multi-Tenant configuration, enter the following SQL query in the box:

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

   e. If connecting to the Dev Schema in the On-Premise Multi-Tenant configuration, enter the following SQL query in the box:

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

4. Click **Save**.

Configure Kofax TotalAgility to access Insight

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

1. If you are not already logged in, log in to TotalAgility Designer.
2. Navigate to **User interface** > **Navigations**.
3. Click the navigation to modify, such as WorkspaceMenu.
4. To add a new menu item, select the navigation such as WorkspaceMenu item and click +.
5. Enter a name for the **Menu item name**.
6. Under the **Redirect** group, select **Insight** for **Type**.
7. Click the **Views** icon in the **Target** box.
8. From the list of Views, select the KAFTA view as your default view in the **Target** box.

   > ⓘ If you are unable to select the KAFTA view, ensure the user name and password for the Administrator user are correctly set in TotalAgility (On the Kofax TotalAgility Home page, click Integration > Insight).
   >
   > You can log in to the TotalAgility Workspace and access the Insight KAFTA View using the menu item you have created. Also see Unable to Log in to Insight Studio.

9. Click **Save**.

Configure TotalAgility resources

1. Log on to Kofax TotalAgility Designer.

2. On the navigation bar, navigate to **Resources** > **Individuals**.
   The **Individuals** page appears.

3. Click **New**.
   The **New individual** dialog box is displayed.

4. On the **General** tab, specify the **Full name**, **User name** and **Category** for the resource.
   The other fields on the tab are optional.

5. Click the **Membership** tab and then click **Add** for **Add associated groups**.
   The **Insight Admin** and **Insight Users** groups are listed by default.

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

6. Select Insight Admin or Insight Users group, as needed.
   The associated group appears under Selected items.

7. Click **Done**.

8. Click **Save**.

Configure user roles for On-Premise Multi-Tenant

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

> ⓘ In the TotalAgility On-Premise environment, the user role is configured automatically. You must configure roles for the On-Premise Multi-Tenant environment.

Configure TotalAgility Admin Role

1. Navigate to Insight **Admin Console** > **Roles** > **KTA Admin Role**.
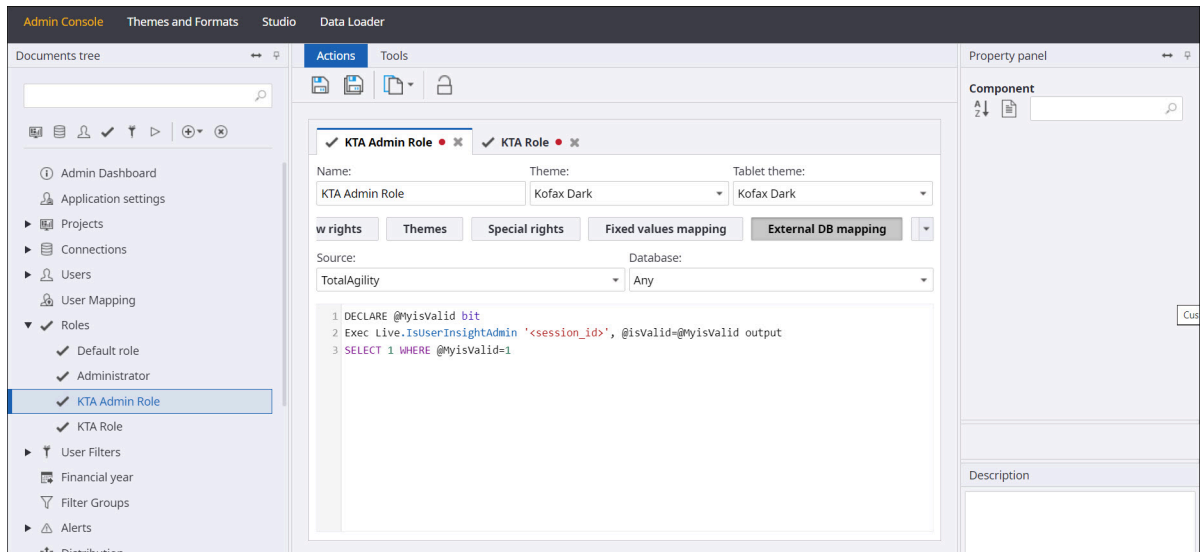
2. Click the **External DB mapping** tab.
3. On the **Source:** list, select **TotalAgility**.
4. On the **Database:** list, select a database. (Default: Any)
5. Enter the following query in the box:

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

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

Configure the KTA Role

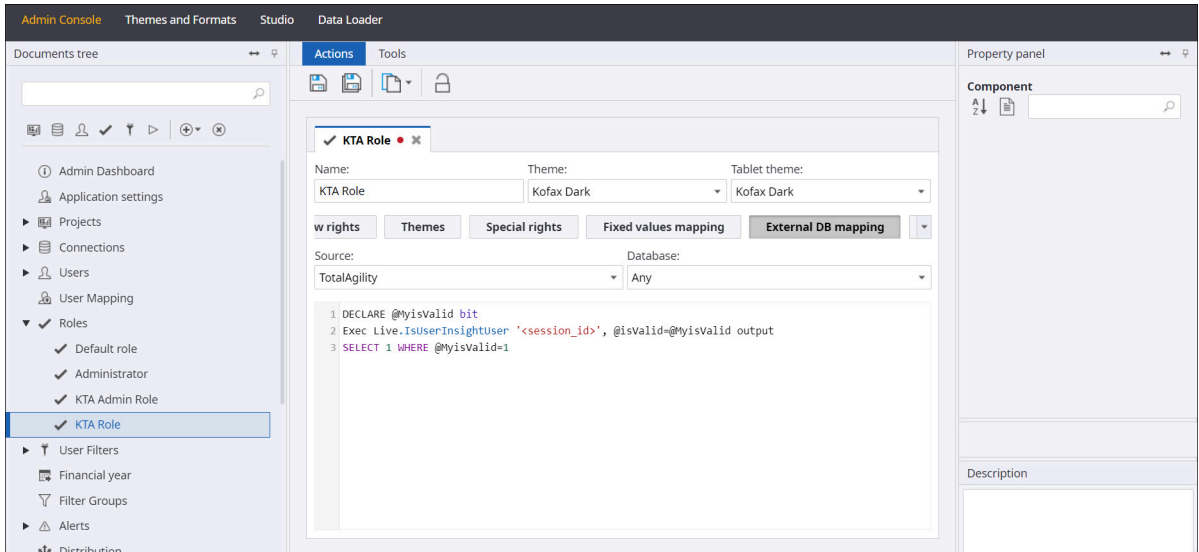1. Navigate to Insight **Admin Console** > **Roles** > **KTA Role**.

2. Click the **External DB mapping** tab.
3. On the **Source:** list, select **TotalAgility**.
4. On the **Database:** list, select a database.
5. Enter the following query:

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

6. Click **Save**.

Configure Administrator role for HTTP request login

When logging into Viewer dashboard via HTTP request using a user with an Administrator role, you must configure the external database mapping for this role so that Administrator privileges are applied.

1. Open **Admin Console** > **Roles** > **Administrator** > **External DB mapping**.

2. On the **Source** list, select **TotalAgility**.

3. On the **Database** list, select **Any**.

4. Add the following SQL query and save the settings.
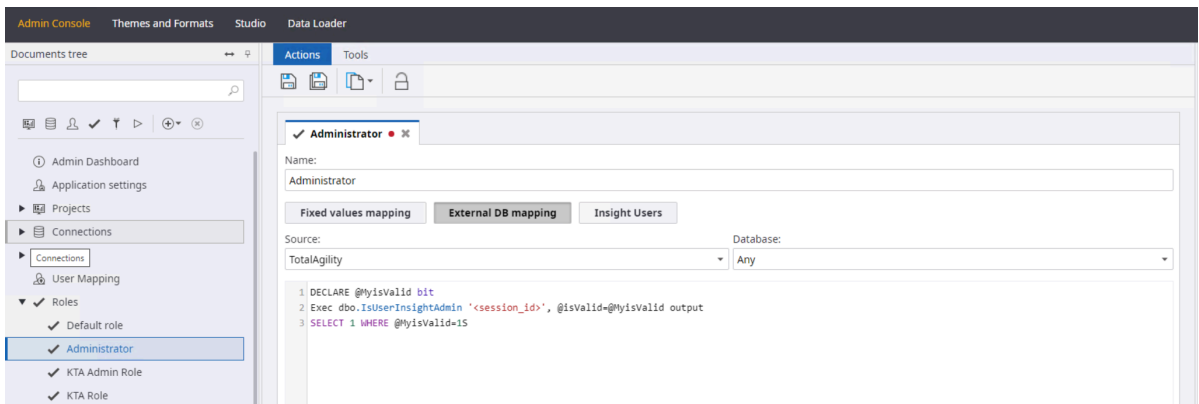
```
DECLARE @MyisValid bit
Exec dbo.IsUserInsightAdmin '<session_id>', @isValid=@MyisValid output
SELECT 1 WHERE @MyisValid=1
```

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

Load data

You can load the following three plans:

- One Time Plan
- Minute Plan
- Hourly Plan

> ⓘ
>
> - When loading the data, you must always run the One Time Plan before running the Minute and Hourly plans.
> - Execute the One Time Plan at least once; otherwise, you will not see any data in the Kofax Analytics for TotalAgility landing page.
> - Make sure the Hourly plan in Kofax Analytics for TotalAgility is always set to run from one day after the TotalAgility 7.8.0 installation date.

1. Navigate to **Start** > **All Programs** > **Insight** > **Data Loader**.

2. On the **Execution Plans** tab, select the project with one time execution plan. For example:
   - PROJECT: KAFTA
   - EXECUTION PLAN NAME: One Time Plan

3. Click **Load**.

4. Under the **Date range** section, do the following:

   a. Under **From date**, select **Beginning of times**.

   b. Under **To date**, select **Current time**.

   c. Select the **Save "To date" as the date of last successful load** check box.

   d. Click **Load data** and wait for the data load to complete.

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

5. Repeat the same steps for the **Hourly Execution Plan** or **Minute Execution Plan**.

> ⓘ After the initial data load, data will be loaded by the "Minute" and "Hourly" execution plans according to the default schedule, which is every 10 minutes and every 1 hour respectively. By default, the Hourly plan is executed at 5 minutes past the hour.

Handle data load

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

Configure email alerts in Kofax Analytics for TotalAgility

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

1. In Insight Studio, on the Documents Tree, click **Tools**.
2. Click the **Settings** icon.
    The **Project settings** window opens.
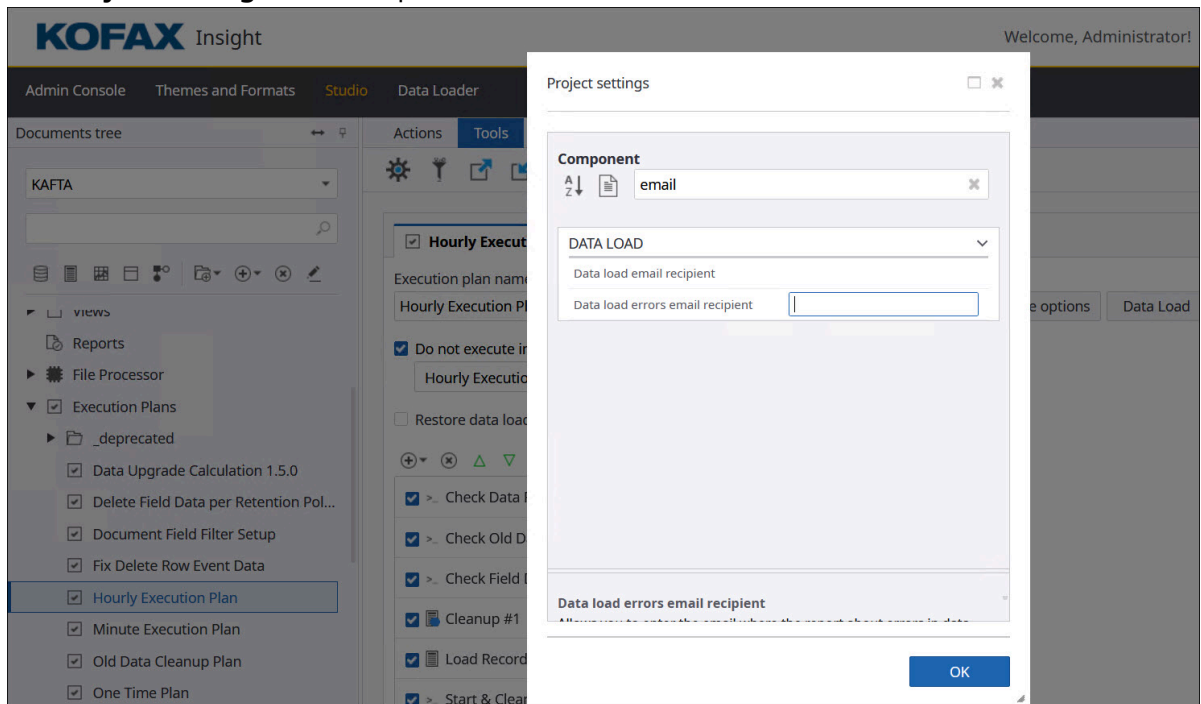
3. In the search box, enter **email**.
4. Select the **Data load errors email recipient** option from the search result, and enter the email ID of the recipient.
5. Click **OK** to confirm the email address.

Manually load data

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

Chapter 5

Upgrade process

This chapter describes the following methods of upgrading Kofax Analytics for TotalAgility:
- Pre-upgrade process
- Silent upgrade process
- Interactive upgrade process

The upgrade procedure can be time-consuming and requires careful planning to ensure successful results.

Ensure the following:
- Allocate sufficient time and disk space to complete the upgrade. We strongly recommend that you review and test the entire upgrade procedure in a pre-production environment before you transition to production.
- Monitor and record the disk space and memory are used while testing, so you can make appropriate adjustments when you transition to production.

> ⓘ During the upgrade process, the transaction log file size may increase two to three times the original database size.

To complete the upgrade successfully, you need the authentication credentials for your Insight database and Kofax Analytics for TotalAgility databases. To perform the upgrade, you must be the database owner for the KAFTA data, KAFTA meta, and Insight admin databases; otherwise, the upgrade process will fail. Once the upgrade process is done, you can use a role that does not require database owner rights.

You can perform a direct upgrade from Kofax Analytics for TotalAgility 1.4.0 (or any interim patches) to Kofax Analytics for TotalAgility 1.5.0.

Direct upgrade of Kofax Analytics for TotalAgility from versions earlier than 1.4.0 to 1.5.0 is not supported. You must first perform an upgrade from Kofax Analytics for TotalAgility to 1.4.0 ((or any interim patches) and then upgrade to 1.5.0.

Prerequisites

Before upgrading to Kofax Analytics for TotalAgility 1.5.0, we strongly recommend that you perform the following steps:
1. Back up your KAFTA Meta and KAFTA Data databases from the previous installation, such as KAFTA_META and KAFTA_DATA.

2. Use the Insight Administrator credentials to log in to Studio.

3. Test and note all credentials (server name, database name and user name) for the following databases: KAFTA Data and KAFTA Meta, TotalAgility, TotalAgility Reporting and TotalAgility Finished. These credentials are required when upgrading to Kofax Analytics for TotalAgility 1.5.0.

4. Upgrade Insight to version 6.4.0.2 or higher; otherwise, the pre-upgrade project may fail or run incorrectly.

5. Upgrade the Kofax Analytics for TotalAgility project using Project_KAFTA-1.5.0.0.zip.
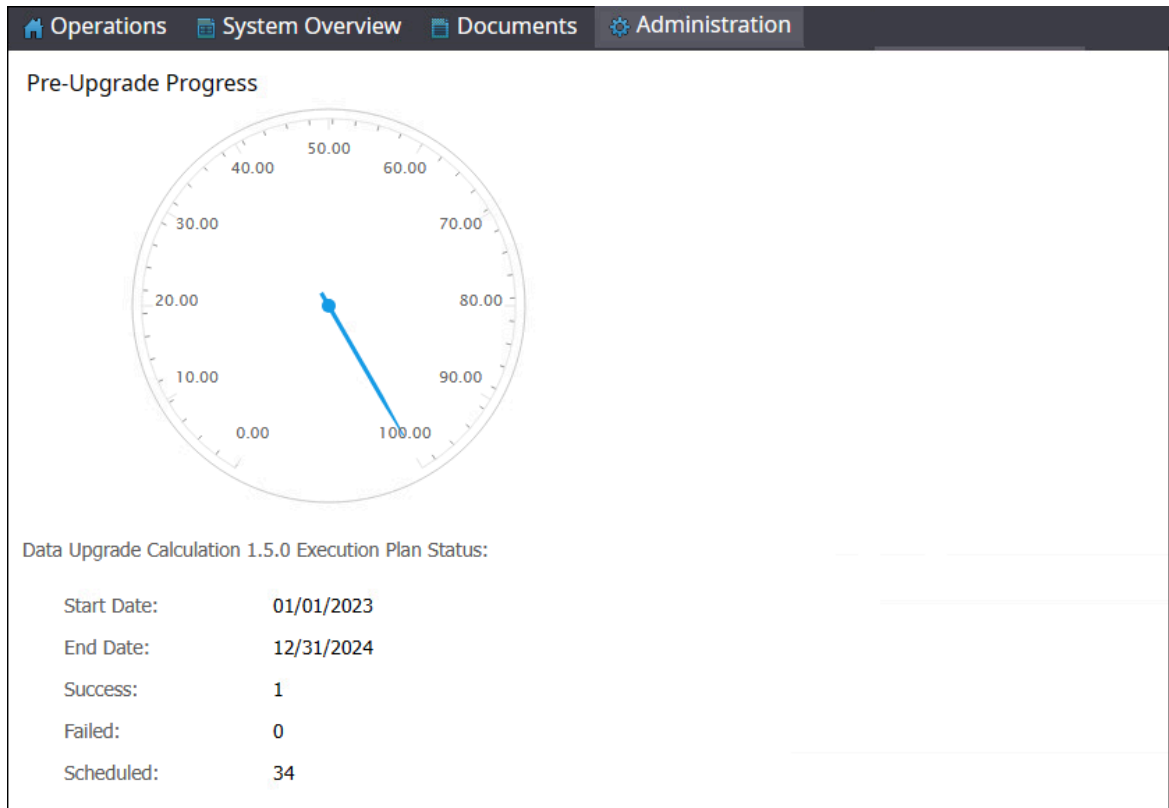
Pre-upgrade process

In a pre-upgrade process, use the Pre-Upgrade Project, a partial Kofax Analytics for TotalAgility project that helps minimize downtime during the actual upgrade process. Performing the pre-upgrade process is optional but we recommend if you have huge historical data with data in terabyte to store in Kofax Analytics for TotalAgility data database. You cannot run the pre-upgrade process run in a silent mode.

> ℹ️ If you login via HTTP request, you must configure the external database mapping for Administrator role. See Configure Administrator role for HTTP request login.

Perform the following steps to perform the pre-upgrade process:

1. Using Insight Studio, navigate to **Tools** > **Import** and select `Pre_Upgrade_Project_KAFTA-1.5.0.0.zip`.
   The **Import** dialog appears.

2. Leave all the default settings and click **Import**.
   Wait for the project to be imported successfully.

3. Update the Data Upgrade Calculation 1.5.0 plan schedule:

   a. Under **Schedule** section, specify the time the plan should run: Daily or hourly.

   > ℹ️ By default, the Data Upgrade Calculation 1.5.0 plan is scheduled to run daily at midnight.

   b. Under **Historic interval**, specify From and To date. From date is the oldest data that you want to retain. To date is the current date. You can also specify a date in the future.

   c. Specify the **Frequency** (default: 1 month) of the historic data to process. That is, the specific range of data that the plan will be run at one time.

4. View the progress of the pre-upgrade process using either of the following ways:
   - Insight Load Console.

     a. Using Data Loader, click the **Load Console** tab.

     > ℹ️ By default, the Scheduled plans are not displayed. You must select the **Schedule** check box under Status column for the schedule plans to be displayed.

- Pre Upgrade Progress menu on the Viewer dashboard (Administration > Pre-Upgrade Progress)

> ⓘ On upgrading to Kofax Analytics for TotalAgility 1.5.0, you must manually run the Data Calculate Plan 1.5.0 again as there will be a gap of data between the plan completion time (specified in To date under Historic Interval) and the time user completes the installation.
>
> To run the plan, specify that Start date and the To date specified in the previous step. The end date is set to Current Time.

If the data is large, it may result in time-out while running the Data Upgrade Calculation 1.5.0 plan. You can increase the time-out by doing the following:

- Start Insight Studio and navigate to **Data Sources** > **Data DB**.
- On the **Property panel**, update the **Query timeout** value to 1000000.
- Update the frequency on 3c to lower value or doing both update frequency and increase the timeout value.

Silent upgrade process

Use the silent upgrade process to upgrade Kofax Analytics for TotalAgility to version 1.5.0 automatically from a command line or a batch file. After you configure all the installation parameters using the UPGRADE.bat file, the upgrade proceeds without any user interaction.

> ⓘ Review the list of prerequisites in the *Kofax Insight Installation Guide* before proceeding, to ensure the Insight installation runs successfully.

Use the following procedure to perform a direct upgrade of Kofax Analytics for TotalAgility from of 1.4.0 to 1.5.0.

1. From your Kofax Analytics for TotalAgility files, navigate to `\` `\KofaxAnalytics-1.5.0_For_TotalAgility\InstallTools\SilentUpgrade`.
2. Extract the contents of SilentUpgrade.zip into a folder.
3. Rename your Kofax Insight license file to Altosoft.Insight.License.xml.
4. Copy the renamed license file along with the following list of files to the same folder where you extracted SilentUpgrade.zip:
   - Project_KAFTA-1.5.0.0.zip
   - Insight 6.4 (or higher) setup *.msi file. For example, KofaxInsightSetup_6.4.0.0.0.626_x64.msi

   > ⓘ The installation folder name should match the version of Insight you are using.

   - Insight Patch setup *.msp file.
     Copy the patch setup file only if you need to install a patch. Kofax Analytics for TotalAgility requires KofaxInsight_6.4.0.2.0.661_x64.msp.
5. 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 following parameters are likely to be changed:

No.	Parameter	Description	Required
1	silent_installpath	Installation path for Insight. The installation folder name should match the version of Insight you are using.	Yes
2	silent_projectname	KAFTA project name. (Default: KAFTA)	Yes
3	silent_sqlserver	Microsoft SQL Server instance name.	Yes
	silent_user	Microsoft SQL Server username. If the values for [silent_user] and [silent_pass] are blank, Windows Authentication mode is used, and credentials for the Insight Scheduler Service are required.	No

No.	Parameter	Description	Required
	silent_pass	Microsoft SQL Server password. If the values for [silent_user] and [silent_pass] are blank, Windows Authentication mode is used, and credentials for the Insight Scheduler Service are required. ⓘ If you use special characters to set a parameter in the .bat file, you must enclose the parameter value within quotation marks.	No
4	silent_data	KAFTA DATA database name	Yes
5	silent_meta	KAFTA META database name	Yes
6	silent_schedulerport	Insight Scheduler Service port. (Default: 13501)	Yes
7	kafta_bundle_project	KAFTA project file (Default: Project_KAFTA-1.5.0.0.zip)	Yes
8	insightadmin_account	Insight Administrator username.	Yes
	insightadmin_password	Insight Administrator password. ⓘ If you use special characters to set a parameter in the .bat file, you must enclose the parameter value within quotation marks.	Yes
9	silent_poolname	The website application pool name where Insight is installed. ⓘ When Windows Authentication mode is used, make sure the Application Pool Identity value is correctly set to the Database Authenticated user. This is required during Insight upgrade.	No
10	silent_insightserviceaccount	Username for Insight Scheduler Service. This parameter is required if [silent_user] and [silent_pass] in parameters #3 are not specified, and Windows Authentication mode is used. The account for Insight Scheduler must have the "Log on as a service" right and should be able to access the databases, including Insight Data, Insight Meta, and TotalAgility databases.	No
	silent_insightservicepassword	The password for Insight Scheduler Service. This parameter is required if [silent_user] and [silent_pass] in parameters #3 are not specified and Windows Authentication mode is used. ⓘ If you use special characters to set a parameter in the .bat file, you must enclose the parameter value within quotation marks.	

No.	Parameter	Description	Required
11	silent_upgrade_insight	Upgrade Insight flag. Set to true if Insight upgrade is required. (Default: false)	Yes
12	silent_upgrade_fixpatch	Upgrade Insight fix pack flag . Set to true if Insight fix pack upgrade is required. (Default: false)	Yes
13	silent_insight_setup_filename	Insight major version setup MSI file name prepared at step #4.	No
14	silent_insight_update_filename	Insight patch setup MSP file name prepared at step #4. Leave this parameter blank if there is no requirement for a patch installation.	No
15	data_upgrade_calculation_startdate	The start date for running Data Upgrade Calculation 1.5.0 plan. The date format used is "YYYY-MM-DD hh24:mm:ss" If the value of data_upgrade_calculation_startdate is blank, 1901-01-01 01:00:00 is used as StartDate.	No
	data_upgrade_calculation_enddate	The end date for running Data Upgrade Calculation 1.5.0 plan. The date format used is "YYYY-MM-DD hh24:mm:ss" If the value of data_upgrade_calculation_enddate is blank, the current date is used as EndDate.	No
16	new_data_retention_policy_confirmation	New data retention policy confirmation. The data retention policy is applied to the data and records. See the "Retention Policy" topic in the *Kofax Analytics for TotalAgility Product Features Guide* and then change the value of this parameter to **true**. (Default: false)	Yes

6. If #11 in UPGRADE.bat file is set to true, update the `InstallManagerSettings.xml` to match the Insight installation settings. Use the template setting file in folder [configuration samples] to overwrite [InstallManagerSettings.xml] if needed. Refer to the *Insight Installation Guide* for more information.

7. Update the connectionString values in Settings.xml to match the TotalAgility database connection settings. Following are the sample connectionString values:

   - **SQL Server Authentication:** `connectionString="Data Source=hostname;Initial Catalog=TotalAgility;User ID=sa;Password=password"`

   - **Windows Authentication:** `connectionString="Data Source= hostname;Initial Catalog= TotalAgility; Integrated Security=SSPI"`

Interactive upgrade process

You can upgrade Kofax Analytics for TotalAgility using the wizard.

Before upgrading Kofax Analytics for TotalAgility to 1.5.0, you must upgrade Insight to version 6.4.0.2 or higher.

> ℹ️ If you have huge historical data with data in terabyte to store in Kofax Analytics for TotalAgility data database, use the pre-upgrade process before performing the actual upgrade process.

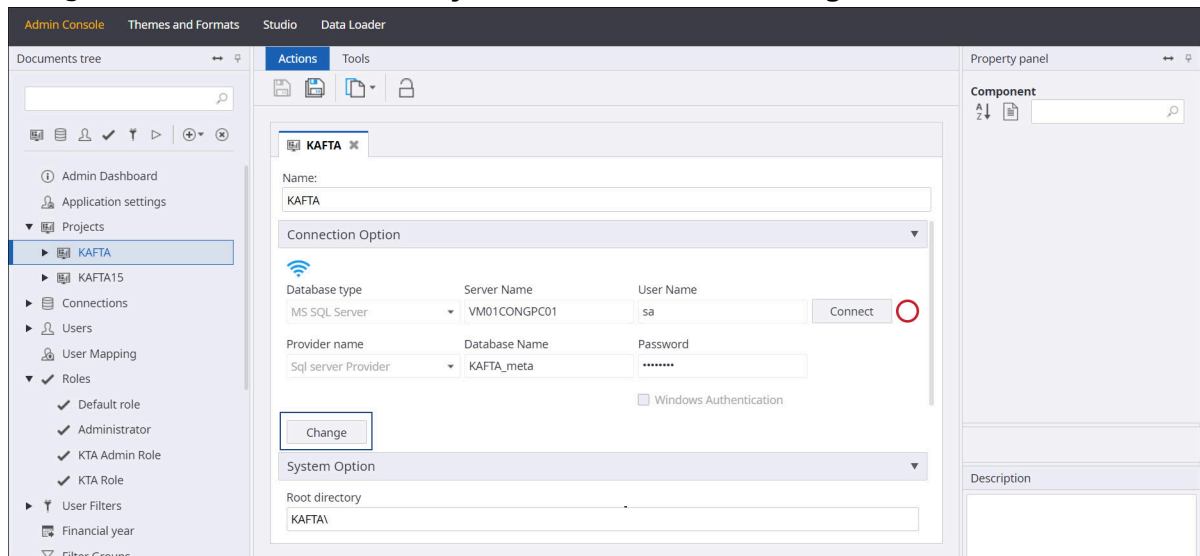1. Extract **KofaxAnalytics-1.5.0_For_TotalAgility.zip**.

   This file contains **Project_KAFTA-1.5.0.0** within the Project folder, which is the Insight Kofax Analytics for TotalAgility project that is imported.

2. Log in to the Insight Admin Console.

   If you have not run Kofax Analytics for TotalAgility 1.5.0 on Insight 6.4 or higher, a pop-up appears confirming the database update. Click **Yes** when prompted to upgrade the current project. The KAFTA_meta and KAFTA_data databases are updated to the current version.

3. Navigate to **Documents tree** > **Projects** > **KAFTA** and click **Change**
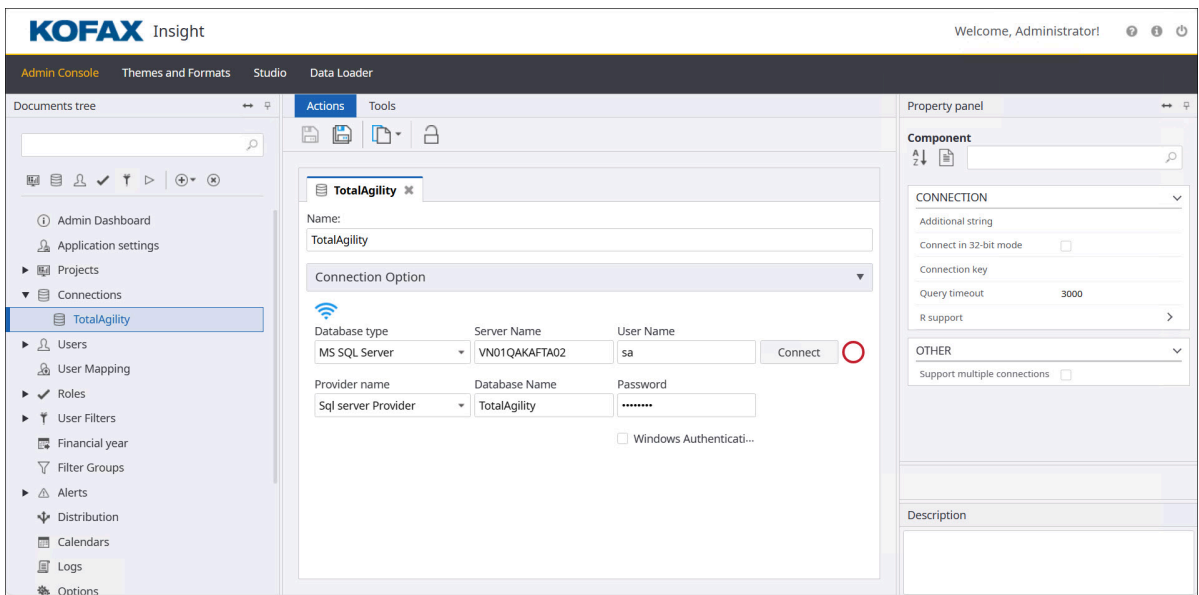

4. To import the Kofax Analytics for TotalAgility 1.5.0 project, click the **Import from file** tab and in the **Data** section, clear the check box for **Use Staging DB**.

5. Click the ellipsis button for **Select file** and select **Project_KAFTA-1.5.0.0** within the Project folder extracted earlier from **KofaxAnalytics-1.5.0_For_TotalAgility.zip**.

6. Click **Connect** to ensure that the project Meta and Data database connection parameters are correct.

7. Click **OK**.

8. Click **Yes** for confirmation.

   A new database is created if a database does not exist; otherwise, the existing database is updated.

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

9. To ensure the connections to databases are correct, open **Admin Console** > **Documents tree** > **Projects** > **KAFTA**.
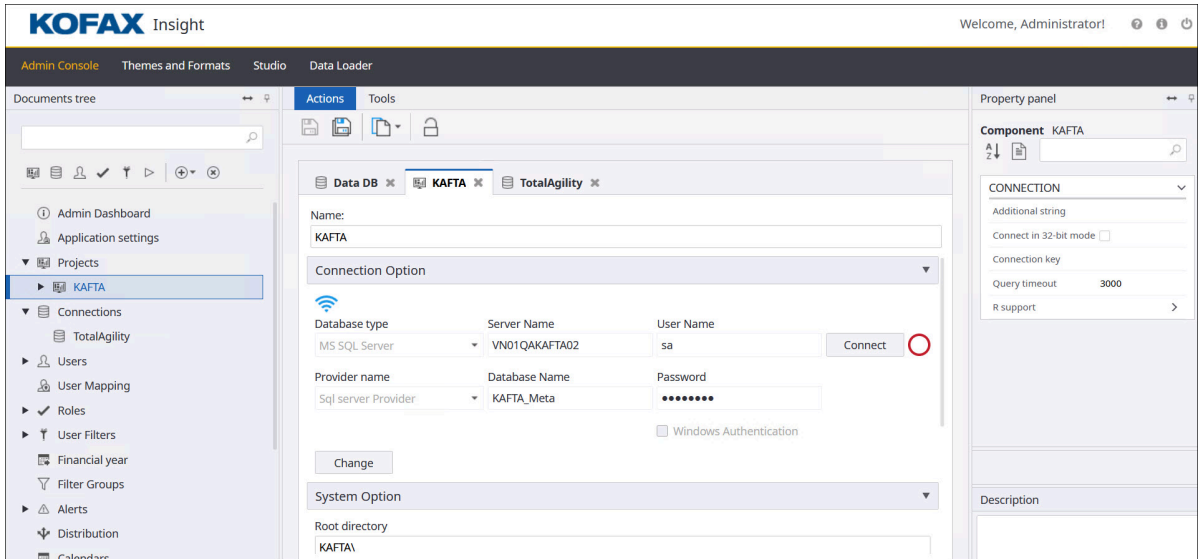
10. Manually restore the credentials in the fields for ReportingDB, TotalAgilityDB, and TotalAgilityFinishedDB and ensure that the connections are correct.

11. Open the **Admin Console** > **Documents tree** > **Connections** > **TotalAgility** and manually restore the connections to TotalAgility database.

12. Log out of Admin Console.

13. On upgrading to Kofax Analytics for TotalAgility1.5.0, you must run the following plans:
    • One Time Plan 1.5 from beginning of times to current time. This is required to load global data such as resource names, SLA levels and so on.
    • Data Upgrade Calculation 1.5 plan from the oldest date of existing data to current date.

14. Login to the Insight Viewer and do the following:

 a. Navigate to **Administration** > **Data Retention**.

 b. Review and make changes to the Field Data Retention and Old Data Retention if required.

 c. Click **Save** to save the changes.

 > ⓘ
 >
 > • Even if no changes are made, you must click Save to confirm the settlings are already reviewed; otherwise, the Hourly Execution Plan fails to run.
 >
 > • The One Time Plan and Hourly Execution Plan fails if the retention policy is not set or following plans are not scheduled:
 >   • Delete Field Data per Retention Policy
 >   • Old Data Cleanup Plan

Troubleshooting

Duplicate entries present

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

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

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

Unable to log in to Insight Studio from the TotalAgility Workspace

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

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

Delete all previous data

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

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

1. Navigate to **Insight** > **Studio**> **Tools** > **Publish and rebuild**.
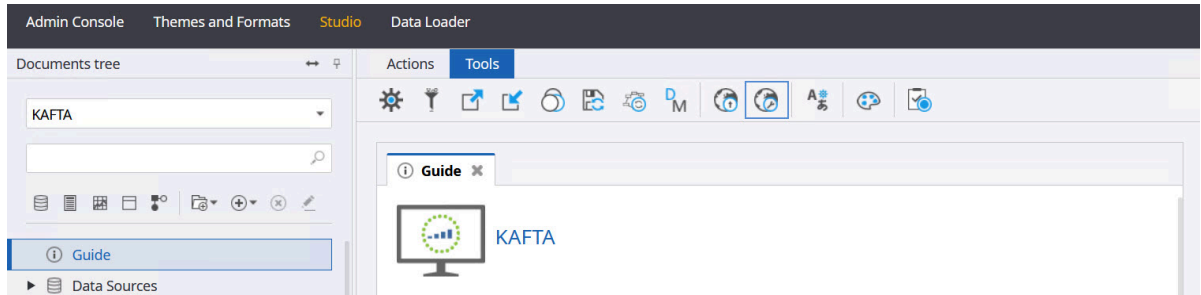
2. Confirm action when prompted.

   The "Publishing validation results" page appears.

3. Click **Continue publishing** after the metadata is validated.

Unable to log in to Dashboard after an upgrade

On upgrading to Kofax Analytics for TotalAgility 1.5.0, if you are not able to log in to the dashboard, do the following:

1. Open **Insight Admin Console**.

2. Reset the user/role mapping for the default ones as the upgrade process overwrites the previous settings.