Kofax Analytics for TotalAgility

Product Features Guide

Version: 1.5.0

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Table of Contents

Preface

This guide gives an overview of the dashboards in Kofax Analytics for TotalAgility. Use this guide to become familiar with the product features. This information can help you decide which features are important to the business challenges you face, and which features best suit your company's needs.

Who should read this guide?

This guide is intended for customers and prospective customers who want to analyze Kofax TotalAgility and Kofax Transformation Modules business data in a real-time, interactive dashboard. Users include business process owners, such as individuals in charge of the invoice or any other process.

Business owners who are planning to implement Kofax TotalAgility and Kofax Transformation Modules should read this guide, especially if they help decide the effectiveness of the workflow and health of the organization.

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 ❓ 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

This guide provides an overview of the dashboard views included in your Kofax Analytics for TotalAgility installation. The dashboards help you track data through the workflow, analyze the effectiveness of the processes and resources, and address business problems. The 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. Select from the comprehensive set of view types provided with the product, or use Insight Studio to create custom views based on the predefined components.

Kofax Analytics for TotalAgility

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

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

Kofax Analytics for TotalAgility includes the following:

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

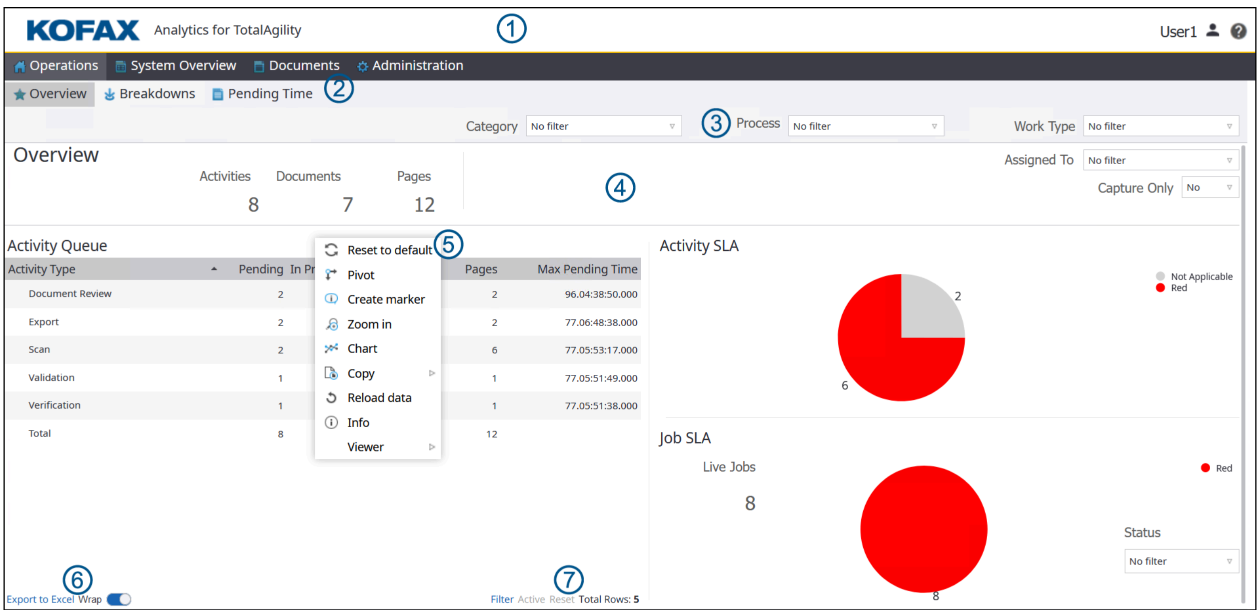
For information about the Kofax Analytics for TotalAgility installation, see the *Kofax Analytics for TotalAgility Administrators Guide*.

Chapter 2

Viewer

The Kofax Analytics for TotalAgility dashboard called the Viewer, consists of interactive views and reports. These views include a variety of visual and analytical representations of data using charts, grids, pivot tables, and reports. The system administrators, business process managers, and other stakeholders use this interface to gain visibility into analytical information.

See the following image for the main elements of the Viewer.



1	Title Bar	Appears on every interface window and includes:
		• Title of the application
		• Name of the logged-in user
		• Current date
		• Additional user menu items when you click the user profile:
		  • **Language:** Switches the dashboard display in another language.
		  • **Bookmarks:** Adds a frequently used view as a favorite and sets bookmark visibility for public, personal, or selected roles.
		  • **About:** To view the currently installed version of Kofax Analytics for TotalAgility.
		  • **Logout:** Logs out current user from the application.

2	Dashboard views	Use the menu to access the following views: • Operations • System Overview • Documents • Administration • RPA • Process Discovery
3	Global Filters	Use the global filters to manage the data that is displayed on the dashboard. Each dashboard has different filters. For example, the Category, Process, and Work Type filters are available on the Overview dashboard, and the Date filter is only applied to reports displaying historical data.
4	Dashboard viewer	Displays the selected dashboard view.
5	Context menus and chart options	Right-click a chart or grid 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. Double-click a chart to change the breakdown. For example, change the data view of a pie chart from Batch Class to Days of the Week or Module Name. Options vary, based on the chart type.
6	Export to Excel	Includes the options to export the dashboard view content to an export format.
7	Chart and Grid Footers	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 the total number of rows.

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

You can create new views using Insight. See *Kofax Insight Documentation* for more information. You can also copy a view supplied with your Kofax Analytics for TotalAgility installation and save it with a new name to modify.

By default, the Viewer appears in the language selected in the Region and Language settings for your operating system. To select another language, see Select a language.

Select a language

When you install Kofax Analytics for TotalAgility, the dashboard views display in the language specified in the browser settings. In the header, on the user profile options, use the language selector to switch to any of the following supported languages:

- English
- Spanish
- French
- Italian

- Brazilian Portuguese
- German
- Japanese

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, click **Export to Excel**.
   The Export to Excel page appears.
2. Select an **Export content:** option:
   - **Current page and top drill down**
   - **All pages of grid, top drill down level. Could take some time.**
   - **All pages of grid, all drill down levels. Could take much longer.**
   - **Export current state.**
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 3

Dashboard views

This chapter explains how to work with the Kofax Analytics for TotalAgility dashboard. The dashboard consists of interactive views and reports that help you look at your business data in meaningful ways. These views include charts, grids, and pivot tables.

Use the following menus to access the Kofax TotalAgility dashboard views:

- Operations
- System Overview
- Documents
- Administration

Operations

The Operations views contain live data that is used to analyze the live (current) activities, jobs, documents, and pages. The data displayed on this dashboard is updated with the minute execution plan giving near real-time information.

The Operations menu includes the following views:

- Overview
  - Activity Queue
  - Activity SLA
  - Job SLA
- Breakdowns
  - Live Jobs
  - Live Documents
  - Live Pages
- Pending Time

Overview

This is the default view that appears when you launch Kofax Analytics for TotalAgility.

The Overview displays the data based on all live activities including:

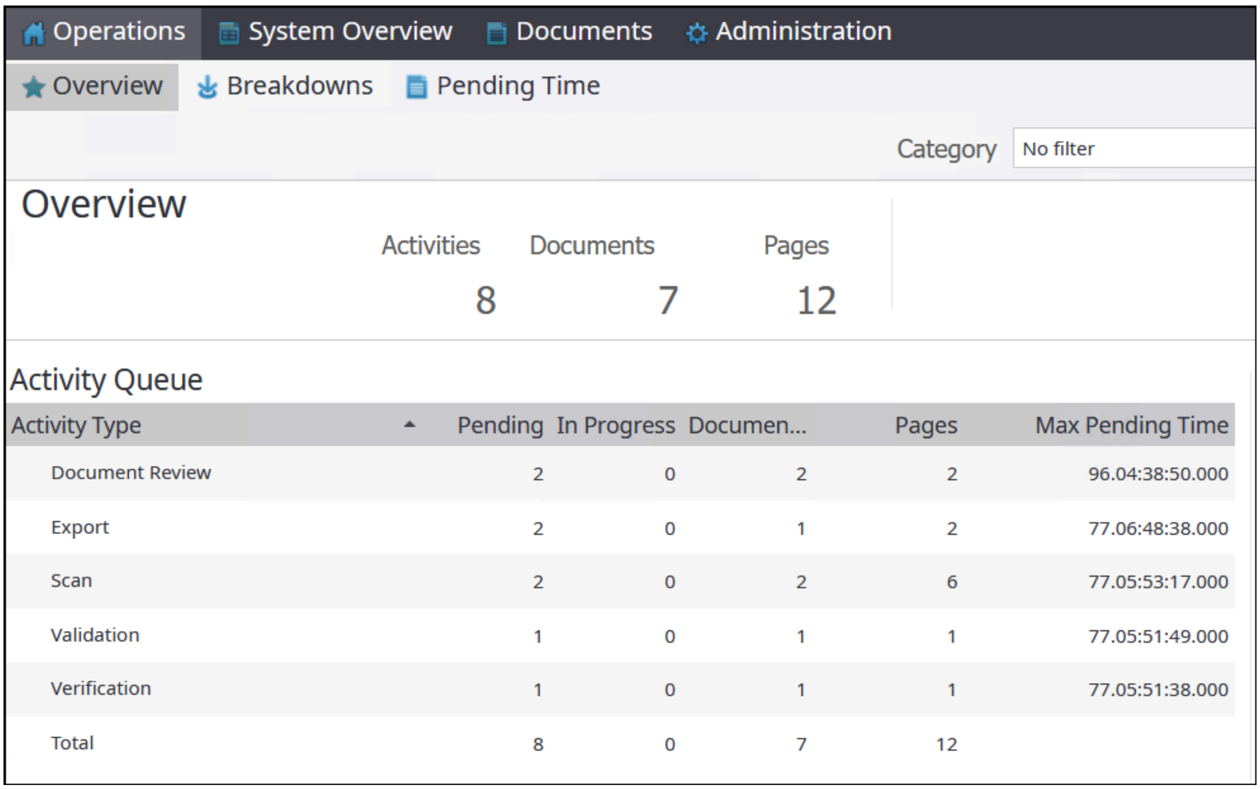
- Global filters for Category, Process, and Work Type
- Page filters for Assigned To, and Capture Only
- Total count of activities, documents, and pages

- Activity Queue
- Activity SLA
- Job SLA

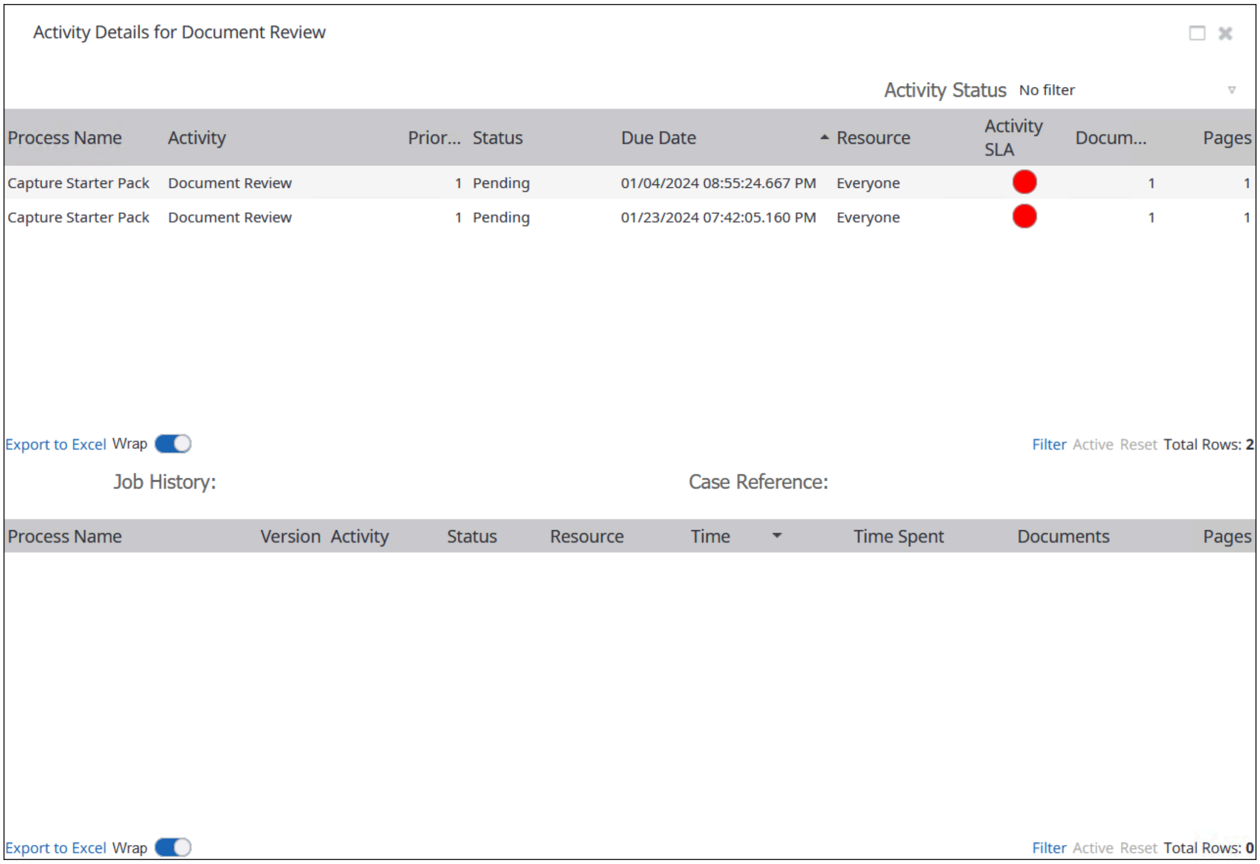
At the top of the view, a count of the live activities, documents, and pages that are currently in TotalAgility is displayed. Use this view to analyze the activity queue, job SLA, and activity SLA.

Activity Queue

A textual chart that displays the information for each activity type, including the count of live activities that are pending and in progress, the count of documents and pages that are pending, and the time for the activity that has been pending the longest.



When you select an activity type in the Activity Queue grid, the Activity Details pop-up displays the details (process name, activity, priority, status, due date, resource, activity SLA, documents, and pages) for that activity type. Use the **Activity Status** filter to view the processes by status, such as Active (In Progress) or Pending.



Select a row in the activity details grid to view the job history details.

When an activity is in progress, the resource column displays the resource that has taken the activity. When an activity is not in progress, the resource column displays the resource or group assigned to the activity.

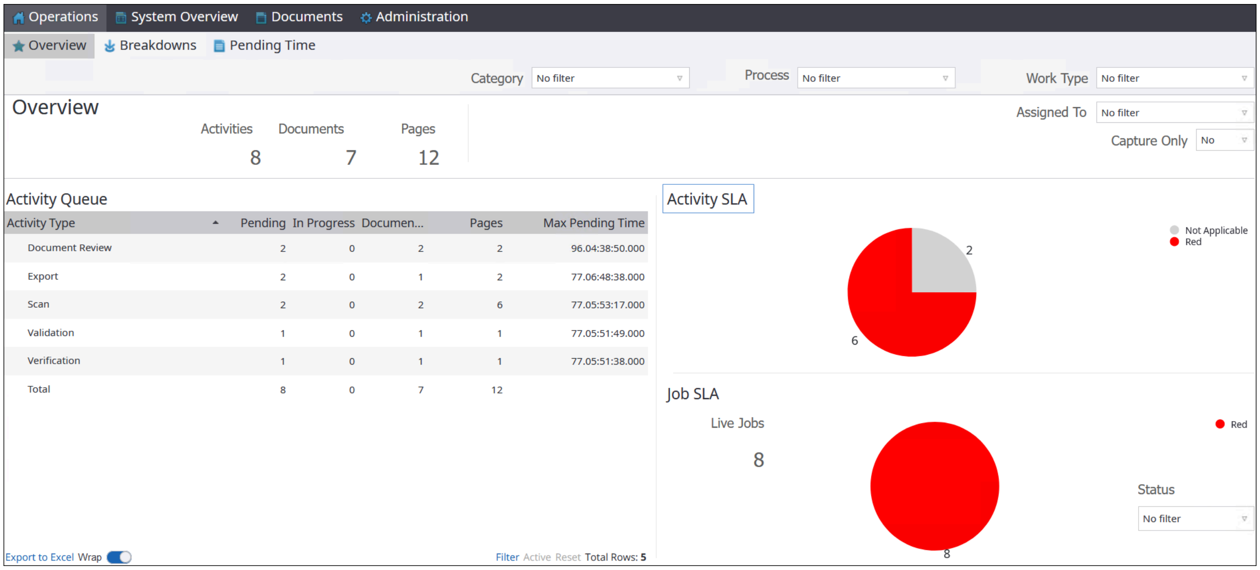
The Activity Queue uses information from the following metric:

Activity Due Max Pending Time: The maximum time each capture Activity Type has been pending.

Activity SLA

A graphical report (pie chart) that provides an overview of activities grouped by SLA (Green, Amber, Red, and any additional levels added).

You can filter the activities by category, process, work type, assigned to, and capture only.

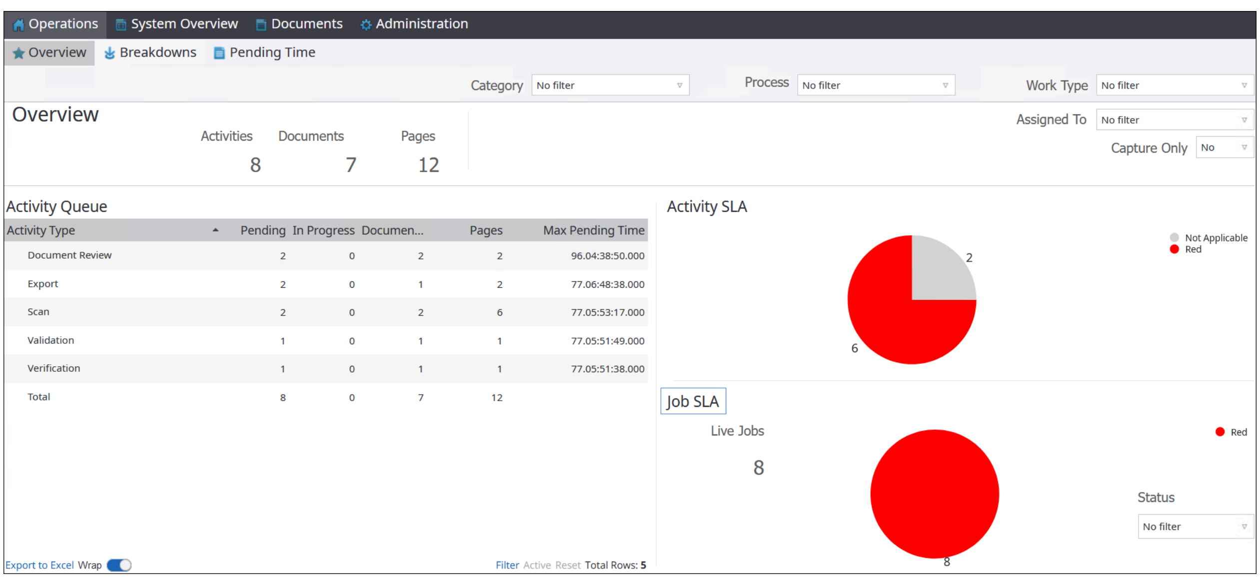


Click the Activity SLA chart to view a textual report that gives further details on the activities including activity name, process name, job ID, due date, priority, assigned to, SLA, job SLA, job priority, case reference, document count, and page count.

Job SLA

A graphical report (pie chart) that provides an overview of jobs grouped by SLA (Green, Amber, Red, and any additional levels added).

You can filter the jobs by category, process, work type, assigned to, capture only, and status such as active, or awaiting completion.



Click the Job SLA chart to view a textual report that gives further details on the jobs including process, job ID, SLA, owner, priority, due date, state, status, case reference, creator, and version.

Breakdowns

Use the Breakdowns view to perform an in-depth analysis of the live data in the Overview based on a range of criteria.

You can view the breakdowns of the following based on the live data:
- Jobs
- Documents
- Pages

To view the breakdowns, navigate to **Operations** > **Breakdowns**.

Live Jobs

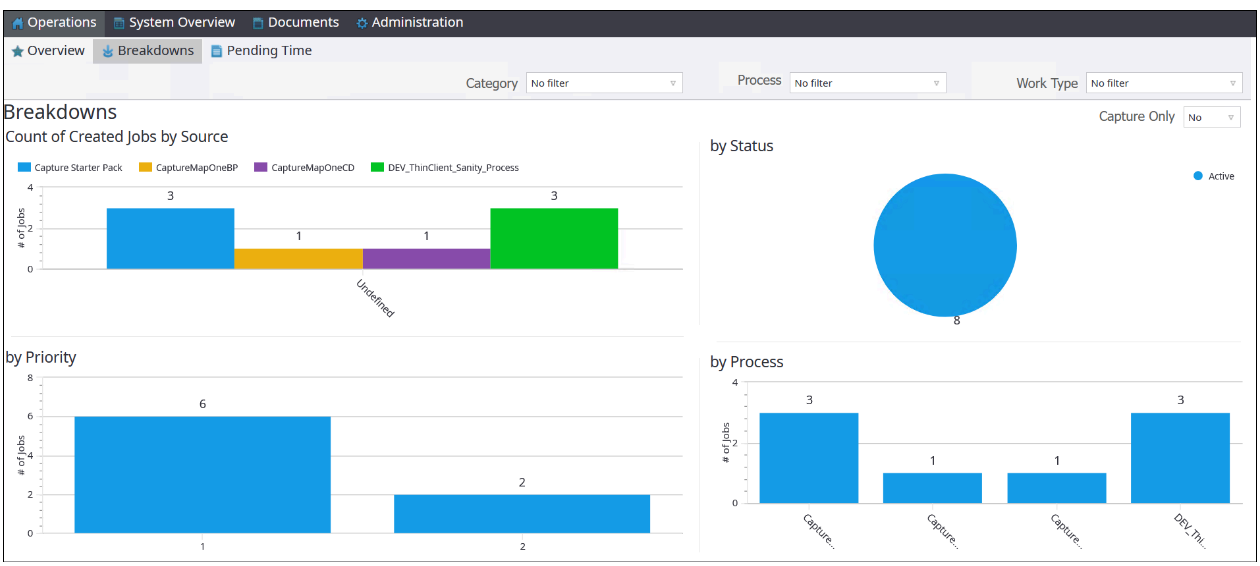
Use the Live Jobs view to display the breakdown of live jobs.

You can view the breakdown of completed jobs separately.

To view the breakdown of live jobs, navigate to **Operations** > **Breakdowns**>Live Jobs.

Each chart on the Live Jobs view displays the breakdown of jobs split by corresponding dimensions: Source, Priority, Status, and Process. Click on the chart to further drill down the data. Click **Home** or right-click on the chart and select the back arrow to go back to the original chart.

You can filter the data by category, process, work type, and capture only.



Jobs Created by Source

The Jobs Created by Source chart displays the breakdown of jobs created and their source in a graphical bar chart. This information is based on the live data. A stacked bar chart appears with the number of jobs created and the job source. To update the job source, call UpdateJobSource() SDK API on the JobService.

We recommend that you update the job source as the first step within the business process.

Jobs by Status

The Jobs by Status chart displays all live jobs by status in a graphical pie chart.

Click on the pie chart to drill down by process or source. You can drill down on all jobs or specify a limit on the number of jobs to drill down. For example, if you set the limit to 20, you can select to drill down the top 20 or bottom 20 jobs.

Select an area on the pie chart to drill down based on the following:
- **Process**: Displays a pie chart with the number of each job by process name grouped by status.
- **Source**: Displays a pie chart with the number of each job by source name grouped by status.

Click Home or back arrow to go back to the original chart.

Jobs by Priority

The Jobs by Priority chart displays the breakdown of the jobs created and their priorities in a graphical bar chart.

The bar chart displays the count of all jobs against the job priorities.

Select an area on the bar chart to drill down the data based on the following:
- **Process**: Displays a bar chart with the count of each job (by process name) grouped by priority.
- **Source**: Displays a bar chart with the count of each job (by source) grouped by priority.

Click Home or the back arrow to go back to the original chart.

Jobs by Process

The Jobs by Process chart displays the breakdown of the jobs created by process in a graphical bar chart. The bar chart appears with the count of all jobs by process type.

Select an area on the bar chart to further drill down the data based on the following:
- **Source**: Displays a bar chart with the count of each job by source grouped by process.
- **Priority**: Displays a bar chart with the count of each job by priority grouped by process.

Click Home or the back arrow to go back to the original chart.

Live Documents

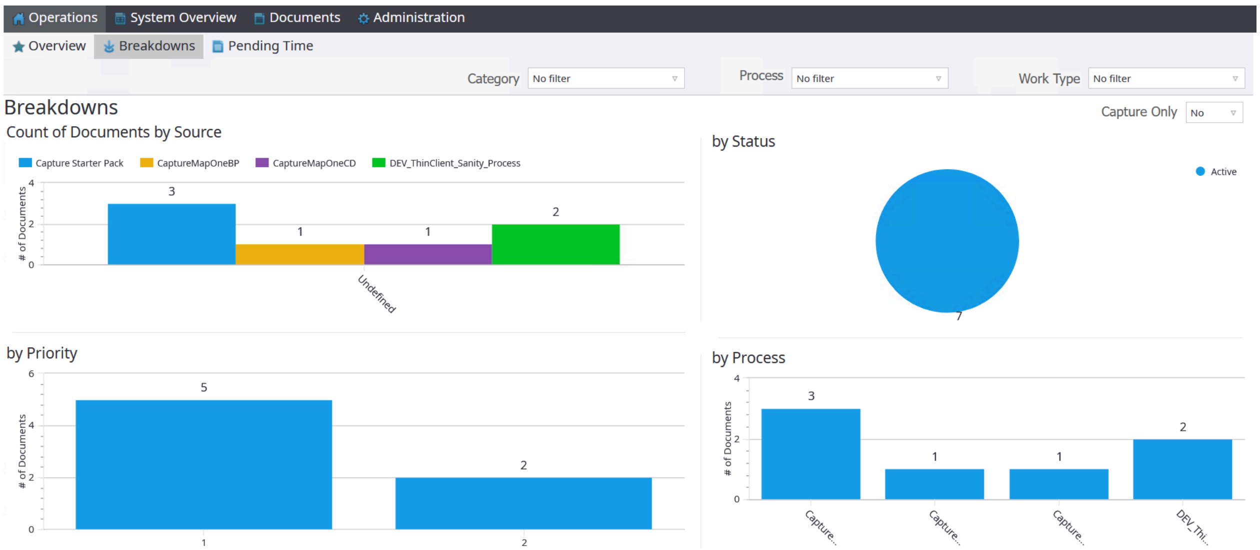
Use the Live Documents view to display the breakdown of live documents.

You can view the breakdown of completed documents separately.

To view the breakdown of live documents, navigate to **Operations** > **Breakdowns**>Live Documents.

Each chart on the Live Documents view displays the breakdown of documents split by corresponding dimensions: Source, Priority, Status, and Process. Click on the chart to further drill down the data. Click Home or right-click on the chart and select the back arrow to go back to the original chart.

You can filter the data by category, process, work type, and capture only.



Count of Documents by Source

The Count of Documents by Source chart displays the breakdown of jobs created and their source in a graphical bar chart. This information is based on the live data. A stacked bar chart appears with the number of documents created and the document source. To update the document source, call UpdateDocumentSource() SDK API on the DocumentService.

We recommend that you update the Document source as the first step within the business process.

Documents by Status

The Documents by Status chart displays all live documents by status in a graphical pie chart.

Click on the pie chart to drill down by process or source. You can drill down on all documents or specify a limit on the number of documents to drill down. For example, if you set the limit to 20, you can select to drill down the top 20 or bottom 20 documents.

Select an area on the pie chart to drill down based on the following:

- **Process**: Displays a pie chart with the number of each document by process name grouped by status.
- **Source**: Displays a pie chart with the number of each document by source name grouped by status.

Documents by Priority

The document by Priority chart displays the breakdown of the documents created and their priorities in a graphical bar chart. This information is based on live data.

The bar chart displays the count of all documents against the document priorities.

Select an area on the bar chart to drill down the data based on the following:

- **Process**: Displays a bar chart with the count of each document (by process name) grouped by priority.
- **Source**: Displays a bar chart with the count of each document (by source) grouped by priority.

Documents by Process

The Documents by Process chart displays the breakdown of the documents created by process in a graphical bar chart. This information is only based on live data. The bar chart appears with the count of all jobs by process type.

Select an area on the bar chart to further drill down the data based on the following:

- **Source**: Displays a bar chart with the count of each document by source grouped by process.
- **Priority**: Displays a bar chart with the count of each document by priority grouped by process.

Live Pages

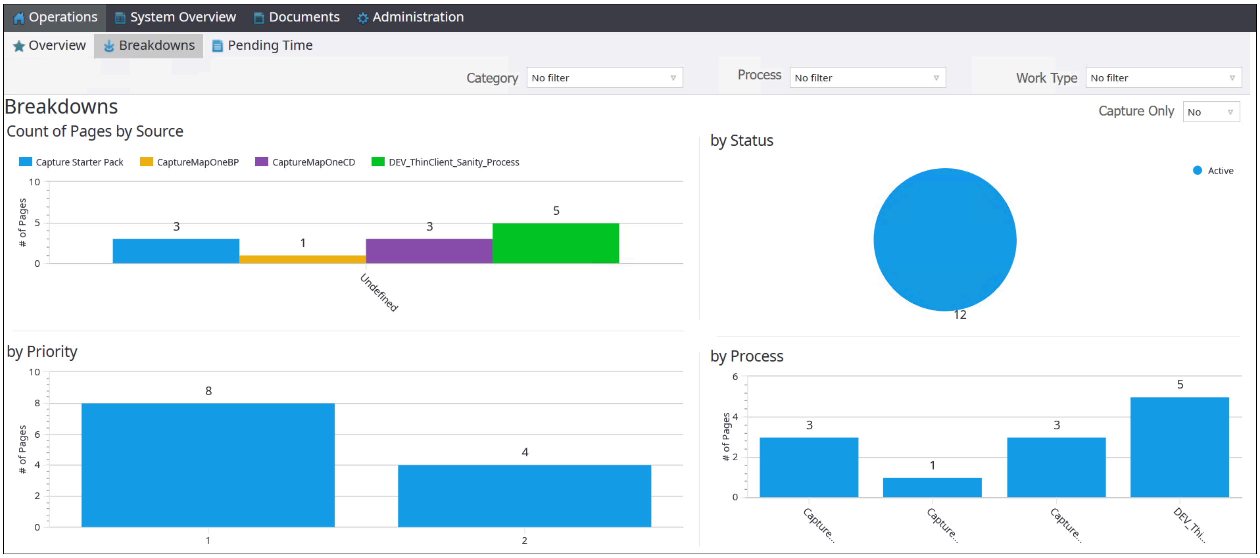
Use the Live Pages view to display the breakdown of live pages based on the live data.

You can view the breakdown of completed pages separately.

To view the breakdown of live pages, navigate to **Operations** > **Breakdowns**>Live Pages.

Each chart on the Live Pages view displays the breakdown of documents split by corresponding dimensions: Source, Priority, Status, and Process. Click on the chart to further drill down the data. Click **Home** or right-click on the chart and select the back arrow to go back to the original chart.

You can filter the data by category, process, work type, and capture only.



Count of Pages by Source

The Count of Pages by Source chart displays the breakdown of pages created and their source in a graphical bar chart based on the live data. A stacked bar chart appears with the number of documents created and the source of pages. To update the document source, call UpdatePagesSource() SDK API on the PageService.

We recommend that you update the Page source as the first step within the business process.

Pages by Status

The Pages by Status chart displays all live pages by status in a graphical pie chart.

Click on the pie chart to drill down by process or source. You can drill down on all pages or specify a limit on the number of pages to drill down. For example, if you set the limit to 20, you can select to drill down the top 20 or bottom 20 pages.

Select an area on the pie chart to drill down based on the following:

- **Process**: Displays a pie chart with the number of each page by process name grouped by status.
- **Source**: Displays a pie chart with the number of each page by source name grouped by status.

Jobs by Priority

The document by Priority chart displays the breakdown of the documents created and their priorities in a graphical bar chart.

The bar chart displays the count of all documents against the document priorities.

Select an area on the bar chart to drill down the data based on the following:

- **Process**: Displays a bar chart with the count of each document (by process name) grouped by priority.

- **Source**: Displays a bar chart with the count of each document (by source) grouped by priority.

Pages by Process

The Pages by Process chart displays the breakdown of the pages created by process in a graphical bar chart. The bar chart appears with the count of all pages by process type.

Select an area on the bar chart to further drill down the data based on the following:

- **Source**: Displays a bar chart with the count of each page by source grouped by process.
- **Priority**: Displays a bar chart with the count of each page by priority grouped by process.

Pending Time

Use the Pending Time view to review the amount of work pending and the work that is not taken for a considerable amount of time. This helps the administrator to view current and historical bottlenecks in the system and identify any performance issues.

You can filter the data by category, process, and work type.

To view the pending time, navigate to **Operations** > **Pending Time**.

A graphical bar chart provides an overview of the pending time of tasks. The chart shows current activities of all types (capture, non-capture, manual, and automatic) grouped by pending time for the following:

- Less than 30 minutes
- Less than 1 hour but more than 30 minutes
- Less than 2 hours but more than 1 hour
- Over 2 hours

When you click an area on the chart, the **Pending Time Details** pop-up list displays further details on each of the activities. The details include Activity Name, Process Name, Job ID, Due Date, Priority, Assigned to, SLA, Document Count, and Page Count.

System Overview

This menu includes the following submenus:

- Jobs
  - Jobs
  - Breakdowns
  - Escalations
  - Trending
- Activities
  - Session Target Time
- Resources
  - Time
  - Cost
  - Resources

Jobs

The Jobs submenu includes the following views:

- Jobs
- Breakdowns
- Escalations
- Trending

Jobs

This view summarizes all completed jobs in the system.

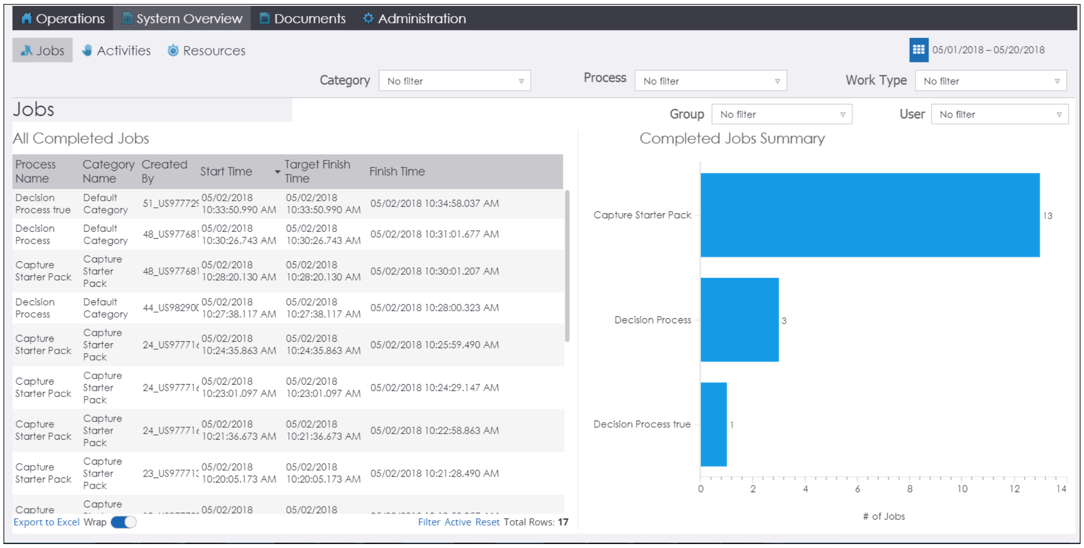
You can filter the data by group and user.

All completed jobs use the following record:

Job Resource Completed: A list of Completed Jobs that also records the Job Creator, the Job Creator's Group, Process, Start Time, Expected Finish Time, Finish Time, Job ID, Category, and Working Duration in Days.

This record uses the Job and Resource Group records as the source of information.

To view the summary of jobs, navigate to **System Overview** > **Jobs** > **Jobs**.



Breakdowns

This view summarizes all completed jobs, documents, and pages in the system. Use the Breakdowns view to perform an in-depth analysis of the data in the Overview based on a range of criteria.

You can view the breakdowns for the following:

- Completed Jobs
- Completed Documents
- Completed Pages

To view the Breakdowns view, click **System Overview** > **Jobs** > **Breakdowns**.

You can filter the data by category, process, and work type.

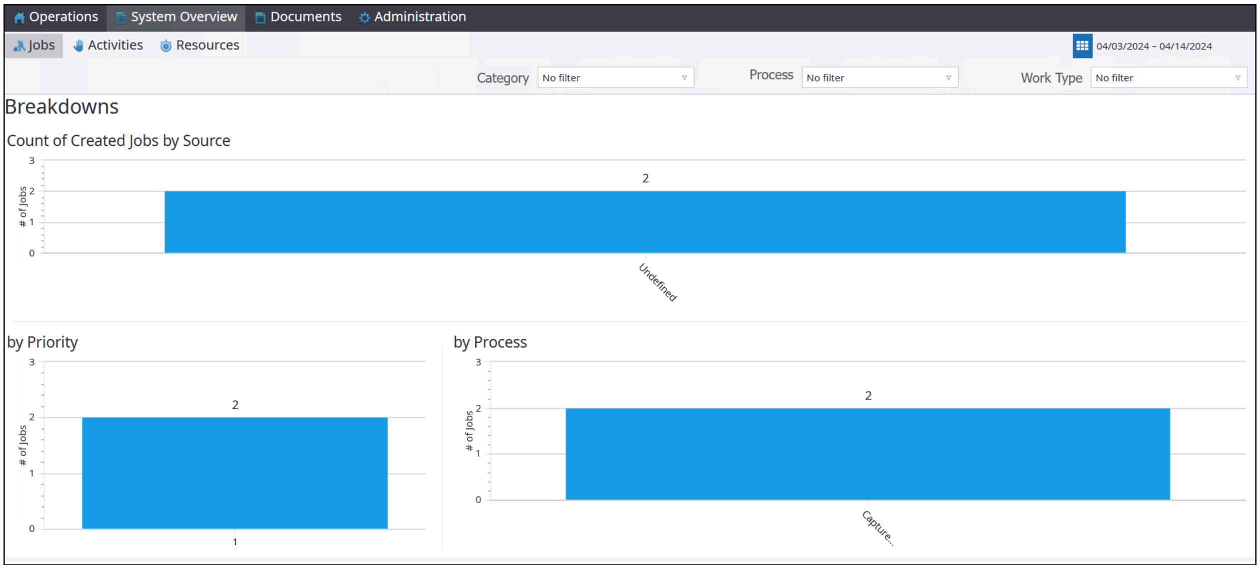
Completed Jobs

Use the Completed Documents Jobs view to display the breakdown of completed jobs. You can view the breakdown of live jobs separately.

To view the breakdown of completed jobs, click **System Overview** > **Jobs** > **Breakdowns** > **Completed Jobs**.

You can filter the data by category, process, and work type.

Each chart on the Breakdowns view displays the breakdown of completed jobs split by corresponding dimensions: Source, Priority, and Process. Click on the chart to further drill down the data. Click Home or right-click on the chart and select the back arrow to go back to the original chart.



Count of Created Jobs by Source

The Count of Created Jobs by Source chart displays the breakdown of jobs created and their source in a graphical bar chart.

A stacked bar chart appears with the number of jobs created and the job source. To update the job source, call UpdateJobSource() SDK API on the JobService.

We recommend that you update the job source as the first step within the business process.

Jobs by Priority

The Jobs by Priority chart displays the breakdown of the jobs completed and their priorities in a graphical bar chart.

The bar chart appears with the count of all jobs against the job priorities.

Select an area on the bar chart to drill down the data based on the following:
- **Process**: Displays the bar chart with the count of each job (by process name) grouped by priority.
- **Source**: Displays the bar chart with the count of each job (by source) grouped by priority.

Jobs by Process

The Jobs by Process chart displays the breakdown of the jobs completed by process in a graphical bar chart. The bar chart appears with the count of all jobs by process type.

Select an area on the bar chart to drill down the data based on the following:
- **Source**: Displays the bar chart with the count of each job by source grouped by process.
- **Priority**: Displays the bar chart with the count of each job by priority grouped by process.

Completed Documents

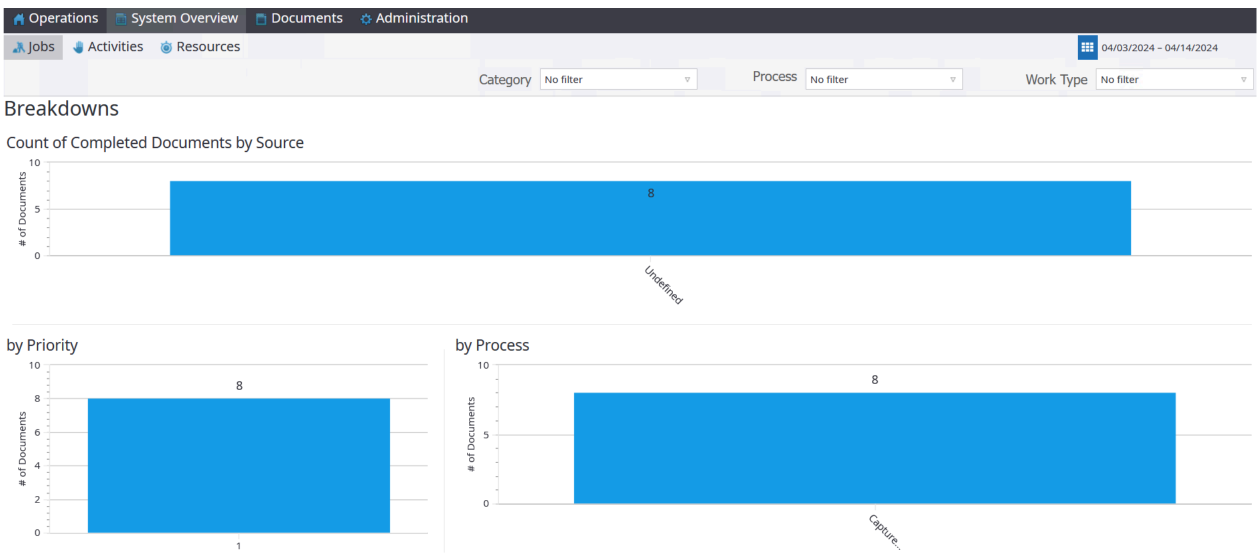
Use the Completed Documents view to display the breakdown of completed documents.

To view the breakdown of completed documents, click **System Overview** > **Jobs** > **Breakdowns** > **Completed Documents**.

You can filter the data by category, process, work type, and date.

Each chart on the Breakdowns of Completed Documents view displays the breakdown of completed documents split by corresponding dimensions: Source, Priority, and Process.

Click the chart to further drill down the data. To go back to the original chart, click Home or right-click the chart and select the back arrow.



Count of Created Documents by Source

The Count of Created Documents by Source chart displays the breakdown of completed documents and their source in a graphical bar chart.

A stacked bar chart appears with the number of documents created and the document source. To update the document source, call UpdateDocumentSource() SDK API on the DocumentService.

Documents by Priority

The Documents by Priority chart displays the breakdown of the completed documents and their priorities in a graphical bar chart.

The bar chart appears with the count of all documents against the document priorities.

Select an area on the bar chart to drill down the data based on the following:

- **Process**: Displays the bar chart with the count of each completed document (by process name) grouped by priority.

- **Source**: Displays the bar chart with the count of each completed document (by source) grouped by priority.

Documents by Process

The Documents by Process chart displays the breakdown of the documents completed by process in a graphical bar chart. The bar chart appears with the count of all documents by process type.

Select an area on the bar chart to drill down the data based on the following:

- **Source**: Displays the bar chart with the count of each document by source grouped by process.
- **Priority**: Displays the bar chart with the count of each document by priority grouped by process.

Completed Pages

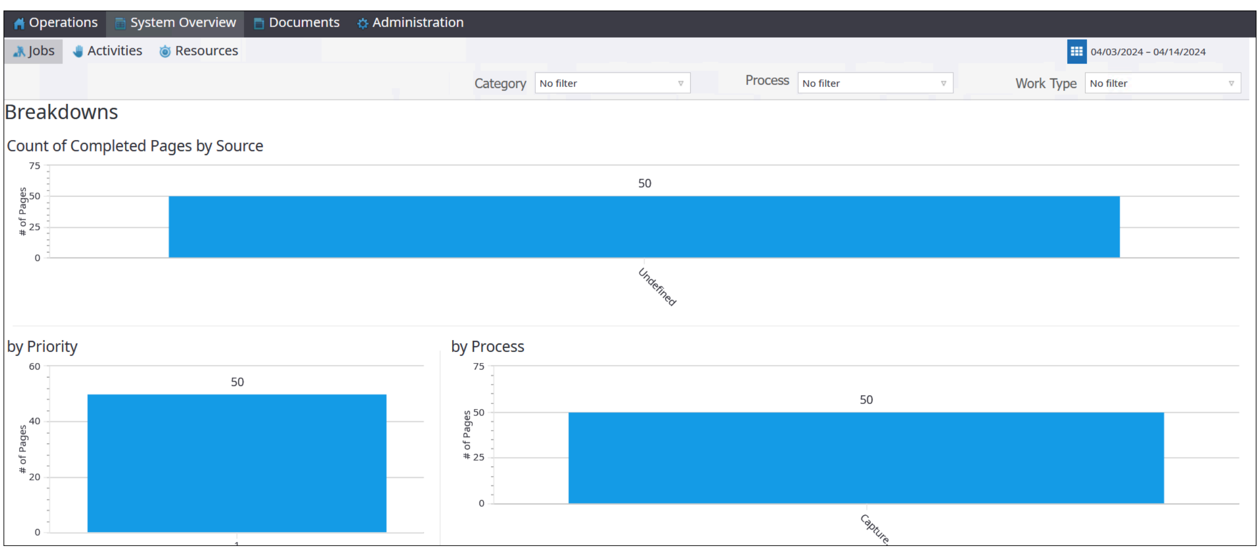
Use the Completed Pages view to display the breakdown of completed pages.

To view the breakdown of completed pages, click **System Overview** > **Breakdowns** > **Completed Pages**.

You can filter the data by category, process, and work type.

Each chart on the Completed Pages view displays the breakdown of completed pages split by corresponding dimensions: Source, Priority, and Process.

Click the chart to further drill down the data. To go back to the original chart, click Home or right-click the chart and select the back arrow.



Count of Completed Pages by Source

The Count of Created Pages by Source chart displays the breakdown of pages created and their source in a graphical bar chart.

A stacked bar chart appears with the number of pages created and the source. To update the source, call UpdatePageSource() SDK API on the PageService.

Pages by Priority

The Pages by Priority chart displays the breakdown of the completed pages and their priorities in a graphical bar chart.

The bar chart appears with the count of all s against the priorities.

Select an area on the bar chart to drill down the data based on the following:

- **Process**: Displays the bar chart with the count of each page (by process name) grouped by priority.
- **Source**: Displays the bar chart with the count of each page (by source) grouped by priority.

Pages by Process

The Pages by Process chart displays the breakdown of the s completed by process in a graphical bar chart. The bar chart appears with the count of all completed pages by process type.

Select an area on the bar chart to drill down the data based on the following:

- **Source**: Displays the bar chart with the count of each completed page by source grouped by process.
- **Priority**: Displays the bar chart with the count of each completed page by priority grouped by process.

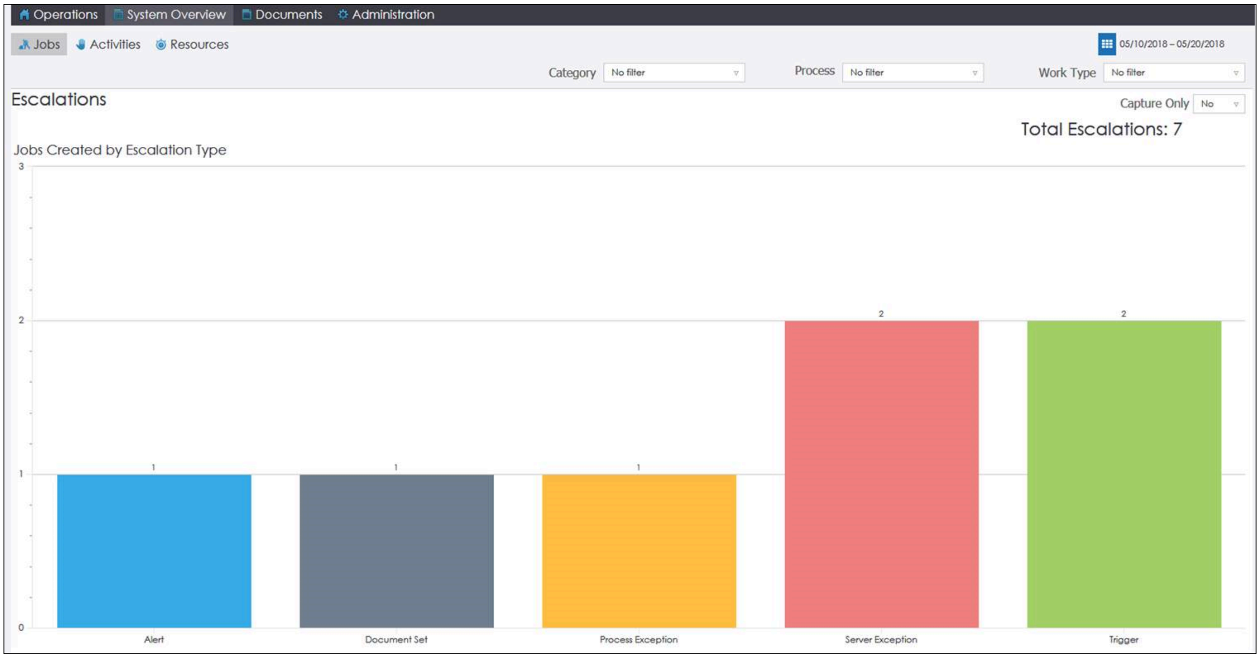
Escalations

Use the Escalations view to review all escalations raised within a specified period.

This view displays a graphical bar chart with jobs created and grouped by the following escalation types: Alert, Document Set (Document Due), Process Exception, Server Exception, and Trigger. The top view displays the total number of escalations.

To view the escalations, navigate to **System Overview** > **Jobs** > **Escalations**.

You can filter the data by Date, Category, Process, Work Type, and Capture Only.



Click an escalation type on the bar chart to further drill down the data. For example, to view the jobs created by the Alert escalation type, click the Alert bar on the chart. The Jobs Created by Alert pop-up list displays a textual report that includes the creation date (sorted in descending order), process, job ID, priority, job owner, and job SLA details.

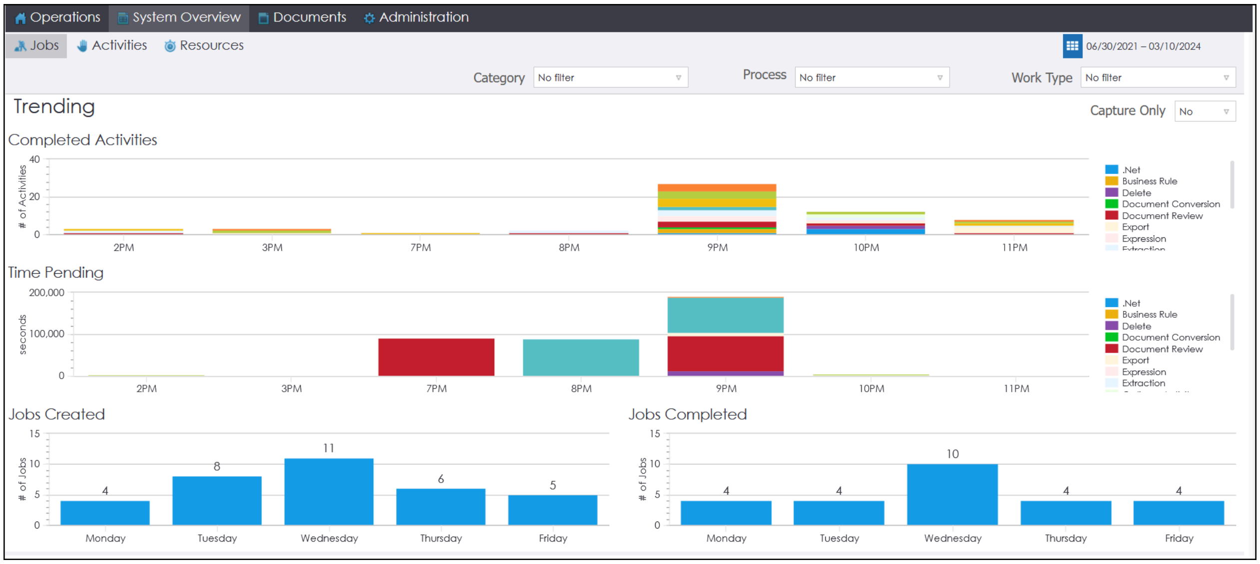
Trending

Use the Trending view to review the trending information for the documents processed in TotalAgility so that you can plan accordingly for staffing.

The Trending view displays the graphical bar charts for created jobs, completed activities, and for how long the activities were pending. This information includes both capture and non-capture activities.

You can filter the data by Date, Category, Process, Work Type, and Capture Only.

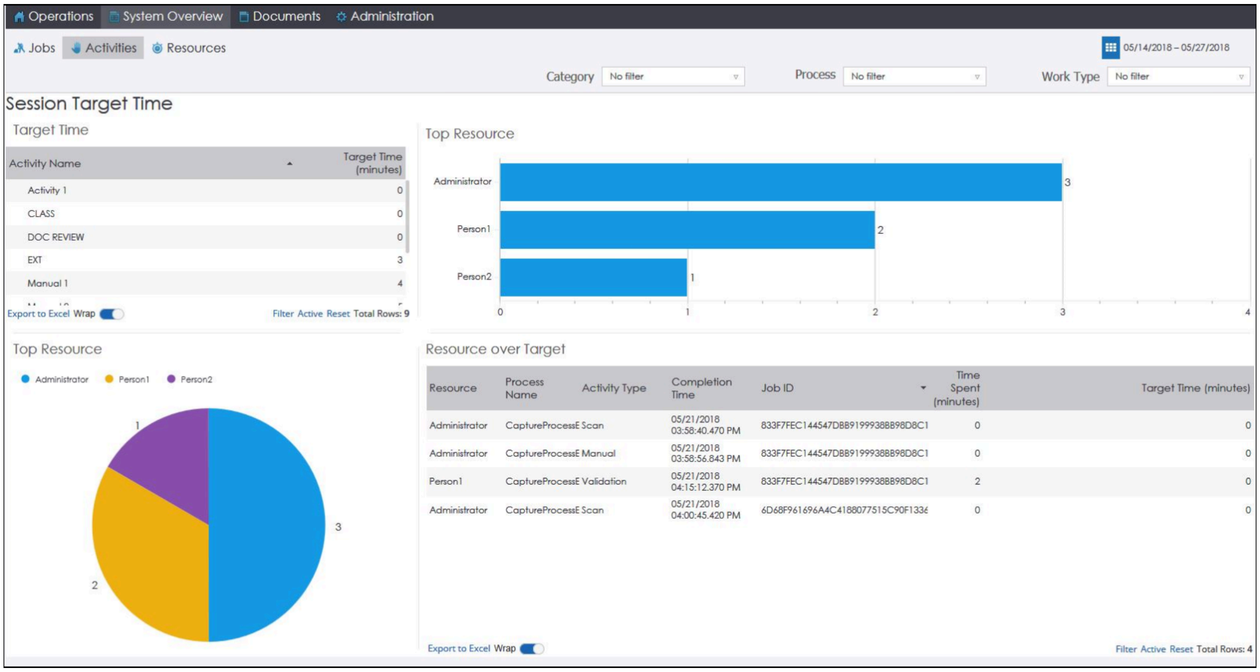
To view the trending of activities and jobs, navigate to **System Overview** > **Jobs** > **Trending**.



View/Chart	Description	Updates
Completed Activities	The breakdown of activities completed on an hourly basis. A stacked bar chart appears with the count of all completed activities for each hour. For example, at 10 AM there are 3 validation activities and 7 document review activities completed. Click an area on the bar chart to view the hourly breakdown for that activity type.	Hourly
Time Pending	A stacked bar chart displays the time when the activities became pending and for how long the activities were pending. This information is a combination of live and historical data and is updated periodically. Click an area of the bar chart to view the hourly breakdown of data for the activity type. You can further filter the jobs by pending/ completed activities.	Hourly
Jobs Created	A bar chart displays the breakdown of jobs created by each day of the week. Click an area on the bar chart to drill down the data based on the following: • **Process**: Displays the daily breakdown for a specific process. • **Hour of Day**: Displays the job count and the hourly breakdown. Click Home or the back arrow to go back to the original chart.	Hourly
Jobs Completed	A bar chart displays the breakdown of jobs completed each day of the week. Click an area on the bar chart to drill down the data based on the following: • **Process**: Displays process type and the daily breakdown. • **Hour of Day**: Displays the job count and the hourly breakdown. Click **Home** or the back arrow to go back to the original chart.	Daily

Activities

Use the Activities submenu to access the Session Target Time view that gives details related to the performance of resources in completing the activities.



Session Target Time

To access the view, navigate to **System Overview** > **Activities** > **Session Target Time**.

Target Time

Displays the textual chart with session target time associated with each activity.

Target Time uses information from the following metrics:

Activity Target Time: Sums of Expected Duration in seconds for activities grouped by activity type.

Top Resource

Displays the pie and bar charts for the top resources who perform the activities in less time than the target time. Click an area on the bar chart or pie chart to drill down the information by category, process activity, day of week, and time.

Top Resources uses information from the following metrics:

Activity Completed Early Count: Information about activities where the WORKING_TIME_SPENT < EXPECTED_DURATION_IN_SECONDS.

Resource over Target

Displays the resources that have exceeded the target time while working on the activities.

Resources over Target uses the following record:

Activity Completed Late: A list of completed activities where the working time spent is greater than the expected duration.

Resources

The Resources submenu includes the following views:

- Time
- Cost
- Resources

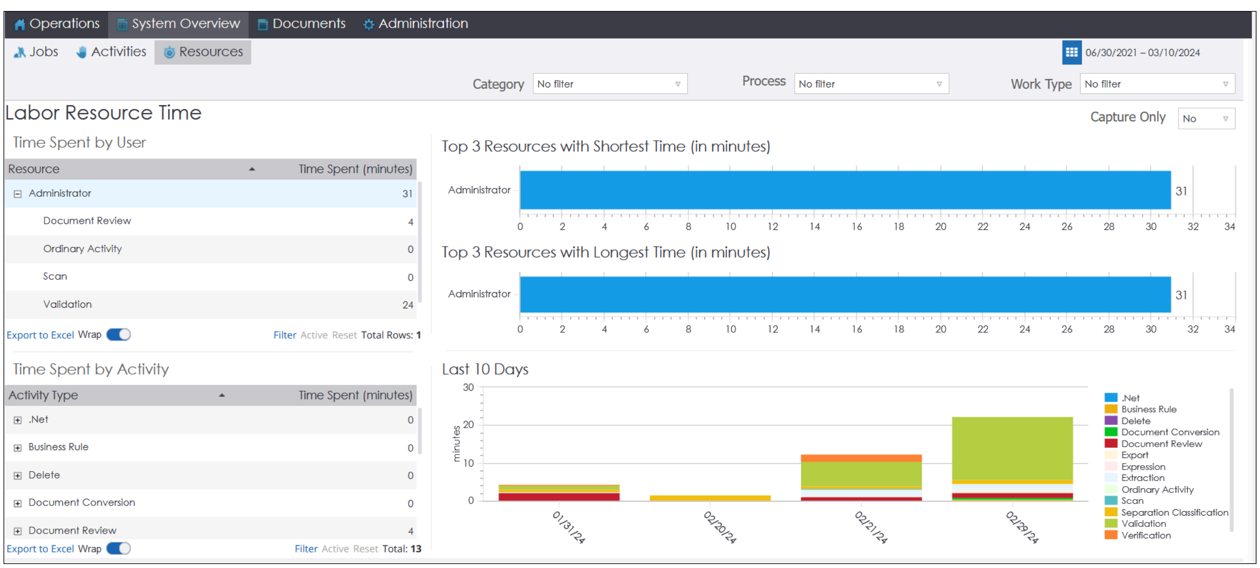
Time

Use the Labor Resource Time view to analyze how resources and costs impact your operation. You can review the breakdown of time spent by the resource on each activity in minutes.

You can filter the data by date, category, process, work type, and capture only.

To view resource time details, navigate to **System Overview** > **Resources** > **Time**.

This view displays the **Labor Resource Time** split by the corresponding dimensions: Time Spent by User, Top 3 Operators with Shortest Time, Top 3 Operators with Longest Time, Time Spent by Activity, and Last 10 Days.



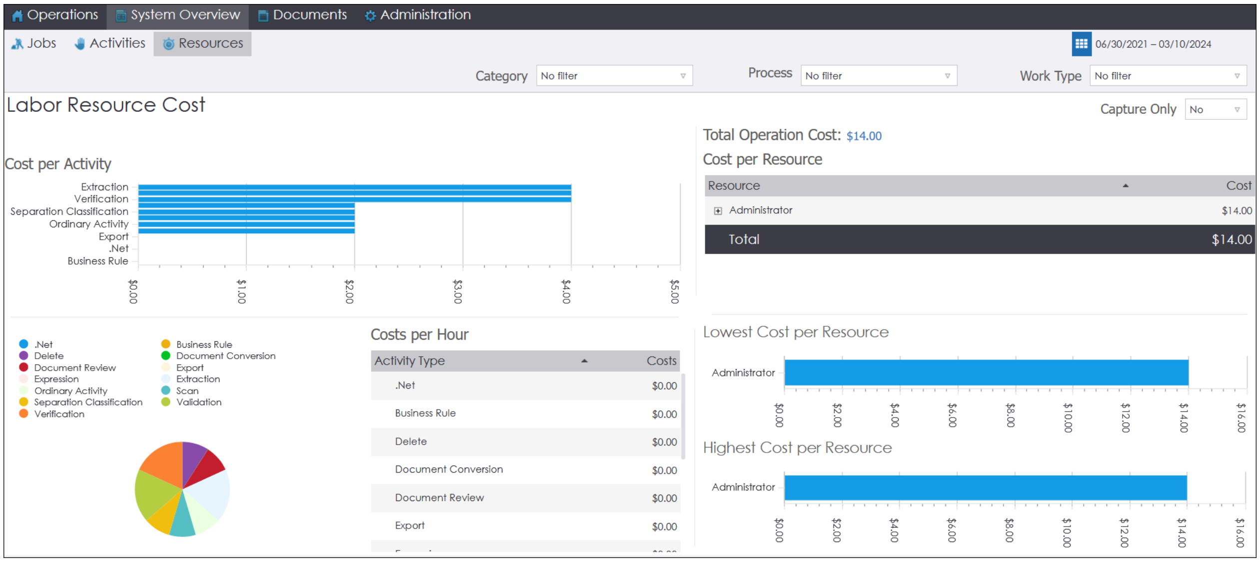
<table>
<tr><th>View/Chart</th><th>Description</th></tr>
<tr><td>Time Spent by User</td><td>Displays a textual chart that includes time (in minutes) spent by a user on each activity.
This chart uses information from the following metrics:
Activity Completed Time Exclude TotalAgility: The completed activities not performed by the system resource.</td></tr>
<tr><td>Time Spent by Activity</td><td>Displays a textual chart that includes time spent by each activity in minutes.
This chart uses information from the following metrics:
Activity Completed Time: The total working time spent on completed activities grouped by Activity Type. You can further break it down by Day of week, Hour of day, Process, or Operator.</td></tr>
<tr><td>Top 3 Resources with Shortest Time (in minutes)</td><td>Displays a bar chart that includes the top three resources who have spent the least amount of time working on activities.
Click an area on the chart to further drill down the data by Activity Type, Category, IsCapture, and Process.
This chart uses information from the following metrics:
Activity Completed Time Exclude TotalAgility: The completed activities not performed by the system resource.</td></tr>
<tr><td>Top 3 Resources with Longest Time (in minutes)</td><td>Displays a bar chart that includes the top three resources who have spent the maximum amount of time working on activities.
Click an area on the chart to further drill down the data by Activity Type, Category, IsCapture, and Process.
This chart uses information from the following metrics:
Activity Completed Time Exclude TotalAgility: The completed activities not performed by the system resource.</td></tr>
<tr><td>Last 10 Days</td><td>Displays a bar chart that includes the time spent on each activity in the past 10 days.
Click an area on the bar chart to further drill down the data by either of the following:
Day of week: Displays the time spent on activities for each day of the week.
Hour of day: Displays the time spent on activities for each hour of the day.
IsCapture: Displays the time spent only on activities for the last 10 days.
Operator: Displays the time spent on activities for each operator.
Process: Displays the time spent on activities for each process.
This chart uses information from the following metrics:
Activity Completed Time: The total working time spent on completed activities grouped by Activity Type. You can further break it down by Day of week, Hour of day, Process, or Operator.</td></tr>
</table>

Cost

Use the Labor Resource Cost view to analyze overall operational labor costs grouped by module and operator. You can also view labor cost comparisons of the top five operators.

You can filter the data by category, process, work type, and capture only.

To view the labor cost details, navigate to **System Overview** > **Resources** > **Cost**.



Cost per Activity

The bar and pie charts display the costs for each capture activity.

This chart uses information from the following metrics:

Activity Completed Cost: The Total Cost of Completed capture activities grouped by Activity Type. You can further break it down by Date, Process, or Operator.

Costs per Hour

A textual chart displays the costs for each capture activity per hour and the running cost per activity type per hour.

This chart uses information from the following metrics:

Activity Completed Cost per Hour: An hourly breakdown of the cost for Completed activities.

Total Operation Cost

A textual chart displays the running cost total for each activity type over the specified time frame and the selected process.

This chart uses information from the following metrics:

Activity Completed Cost Exclude TotalAgility: Similar to Activity Completed Cost but activities completed by the System resource are not included.

Lowest Cost per Resource

A bar chart displays the three least costly resources. Hover the mouse on the bar for details on the time frame and cost.

This chart uses information from the following metrics:

Activity Completed Cost Exclude TotalAgility: Similar to Activity Completed Cost but activities completed by the System resource are not included.

Highest Cost per Resource

A bar chart displays the three most costly resources. Hover the mouse on the bar for details on the time frame and cost.

This chart uses information from the following metrics:

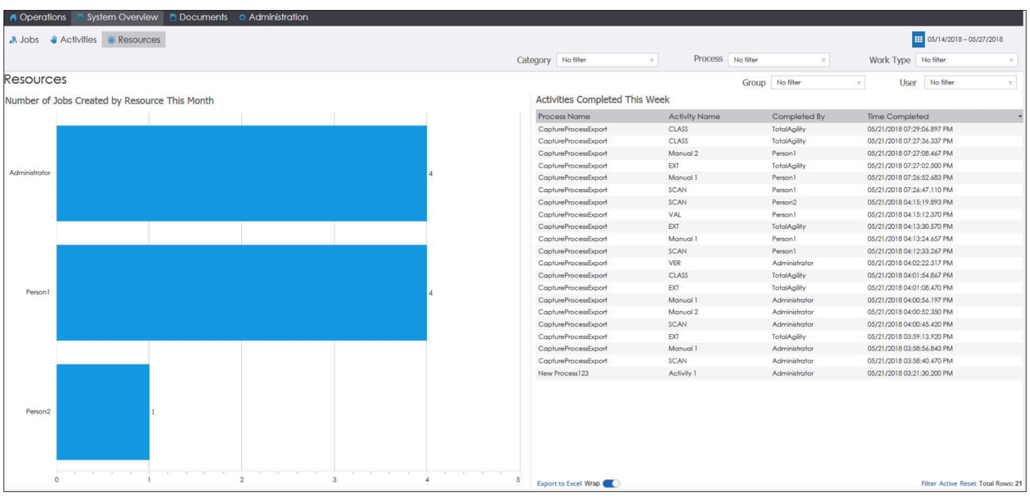
Activity Completed Cost Exclude TotalAgility: Similar to Activity Completed Cost but activities completed by the System resource are not included.

Resources

Use the Resources view to review the number of jobs created by a resource in a month and the summary of all activities completed by each resource from the beginning of the week until the current date.

To view the resource summary, navigate to **System Overview** > **Resources** > **Resources**.

You can filter the data by category, process, work type, group, and user.



Number of Jobs Created by Resource This Month

A bar chart displays the jobs created by each resource from the start of the month until the current date.

This chart uses information from the following metrics:

This record uses the number of Jobs created grouped by Job Creator. This metric uses the Job Resource Created Record and includes Category, Start time, Process, and the Job creators group.

Activities Completed This Week

A textual chart displays the summary of all the activities completed by each resource from the beginning of the week until the current date.

This chart uses the following records:

Activity Resource Completed: A list of Completed Activities grouped by Performing Resource that also record the Job's Category, Completion Time, Performing Resource's Group, Activity Name and Process.

This record uses the Activity, Resource Group, and Job records as the source of information.

Documents

The Documents menu includes the following submenus and views available within each submenu:

- Processing
  - Document Trending
  - Document Export Trending
  - Document Search
  - Deleted Documents and Pages
  - Rejections
  - Resource Productivity
  - Document Processing Time
  - No Touch Processing
- Classification
  - Classification Statistics
  - Classification Chart
  - Classification Benchmark
  - Classification Trending
  - Page Classification Details
- Extraction
  - Extraction Statistics
  - Extraction Chart
  - Extraction Benchmark
  - Extraction Trending

If the process data does not exist for a document, the Documents views in Kofax Analytics for TotalAgility show the related process and activity names as [Not Available]. The scenarios that could cause this include the following:

- When APIs are called outside of a process.
- If the "Include in analytics" property is not set on a process in TotalAgility Designer.

- If documents are deleted before the job is created (SCNJ/DCNJ).
- When the number of pages in a document changes and then the document is deleted in the same session.
- When job results are terminated in the Document Overview | Activity name to display not available.

Processing

This submenu includes the following views:

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

You can filter the data by category, classification group, extraction group, and document type.

Document Trending

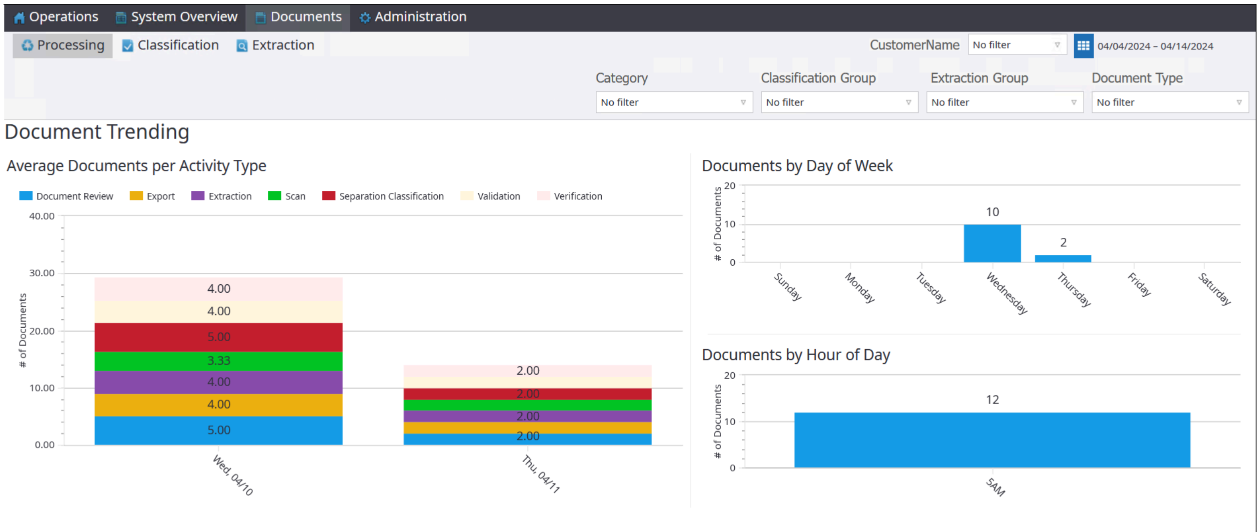
Use the Document Trending view to review the document trends per session, per day of the week, or hourly for a specific day of the week. This view shows the trending information for documents processed in TotalAgility so that you can plan accordingly for staffing.

To view the document trends, navigate to **Documents** > **Processing** > **Document Trending**.

The Document Trending view displays the following graphical bar charts:

- **Average Documents per Activity Type**: Displays the count of distinct documents grouped by type of completed capture activities. The global date range determines whether the chart is drilled down by year, month, day, or hour. For example, the X-axis shows the data by hours when filtering for only a day's worth of data and shows the data by dates when filtering the data for a month.
- **Documents by Day of Week**: Displays the count of distinct documents grouped by the day of the week they were created in TotalAgility during the selected date range. For example, a count for Tuesday is not only the most recent Tuesday, but all Tuesdays during the selected date range.
- **Documents by Hour of Day**: Displays the count of distinct documents for each hour of day created in TotalAgility. For example, at 9 PM there are 20 validation activities and 20 document review activities completed. Click an area on the bar chart to view the hourly breakdown for that activity type.

You can filter the data by category, classification group, extraction group, and document type.



Click an area on the **Documents by Day of Week** and **Documents by Hour of day** charts to further drill down the data by document type, activity type, day of week, document type, machine name, and process. You can drill down the data on all jobs or specify a limit to drill down on the number of jobs from the top or bottom. For example, if you set the limit to 20, you can drill down the top 20 or bottom 20 jobs.

When you create documents in TotalAgility using a scanner or MFP, the name of the machine used for scanning is displayed in the Documents by Day of Week and Documents by Hour of day charts.

Document Export Trending

Use the Document Export Trending view to review the trend of exported documents from TotalAgility per day of the month, day of the week, and hour of the day.

To view the document export trends, navigate to **Documents** > **Processing** > **Document Export Trending**.

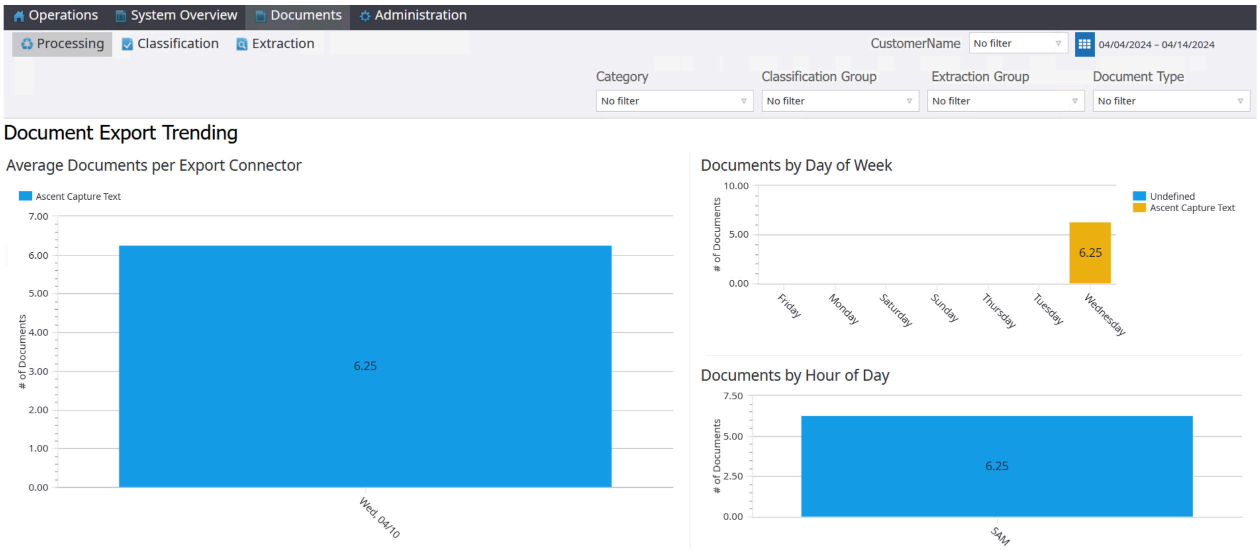
The height of the bars represents the number of exported documents. This view works on both old and new data. You can apply all global filters for this view, including Filter Field, Date, Category, Classification Group, Extraction Group, and Document Type.

The Document Export Trending view displays the following graphical bar charts:

- **Average Documents per Export Connector**: Displays the count of exported documents grouped by type of export connectors. The global date range determines whether the chart is drilled down by day, hour, minute, quarter, second, or week. For example, the X-axis shows the data by hours when filtering for only a day's worth of data and shows the data by dates when filtering the data for a month.
- **Documents by Day of Week**: Displays the count of exported documents grouped by the day of the week they were created in TotalAgility during the selected date range. For example, a count for Friday is not only the most recent Friday, but all Fridays during the selected date range.

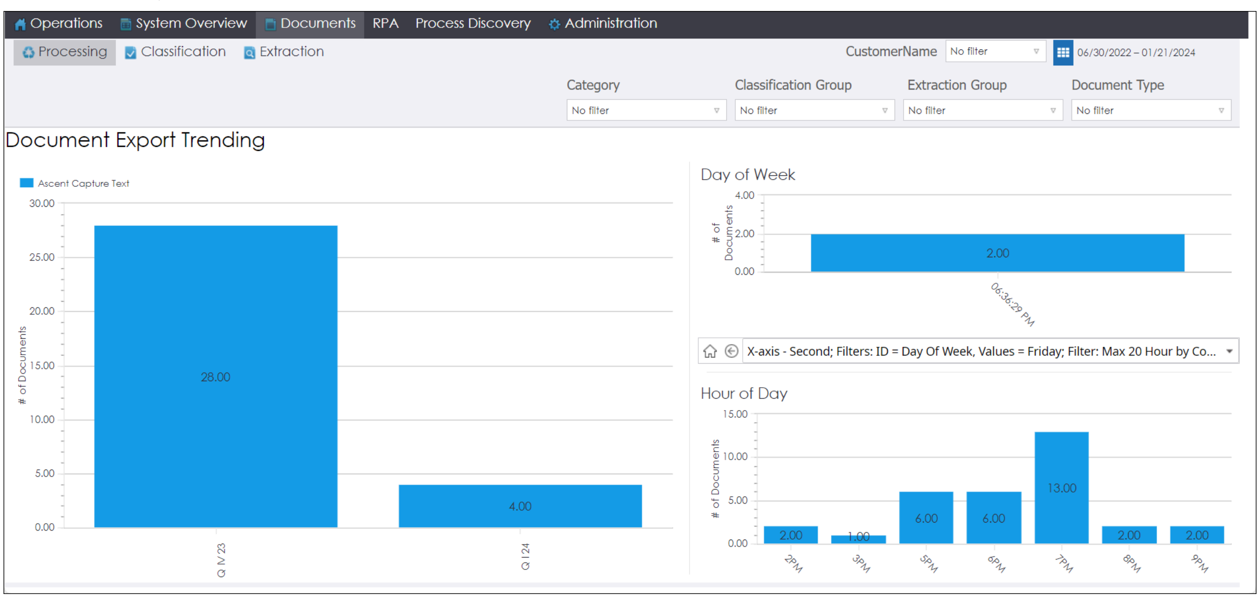
- **Documents by Hour of Day**: Displays the count of distinct documents exported for each hour of day created in TotalAgility. For example, at 8 PM there are 10 documents exported. Click an area on the bar chart to view the hourly breakdown for that export connector.

You can filter the data by filter field, date, category, classification group, extraction group, and document type.



Click an area on the This Week, Documents by Day of Week, and Documents by Hour of Day charts to further drill down the data by hour and orientation. You can drill down the data on all documents or specify a limit to drill down on the number of documents from the top or bottom. For example, if you set the limit to 20, you can drill down the top 20 or bottom 20 documents.

Click an area on the "Day of Week" chart to drill down to the Export Connector level if you click on the data bar.



Document Search

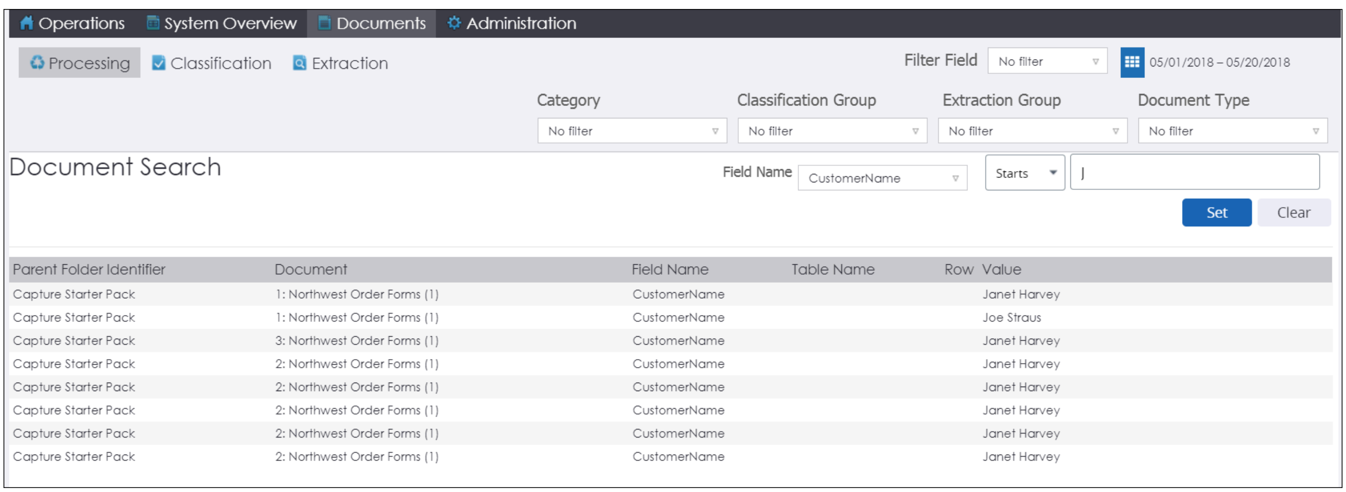
Use the Document Search view to look for documents based on the field names and field values so that you can quickly find details related to the processing of the document in TotalAgility. The height of the bars represents the number of completed documents. This view works on both old and new data.

> The data on the Document Search view is displayed based on the Field Fact table. If the document's field data was deleted by the Field Data Retention policy, such documents are not found on performing the search.

To search for the documents, navigate to **Documents** > **Processing** > **Document Search**.

By default, the results page is empty. When the Capture processing is complete through TotalAgility, the field names are available on the **Field Name** list in the Document Search view. Select the field name and value as the search criteria to view the results. You can select multiple fields to search. If you select at least one field, all the documents containing the field and matching the search criteria are displayed.

The search results matching the criteria include the following columns: Parent Folder Identifier, Document, Field Name, Table Name, Row, and Value.



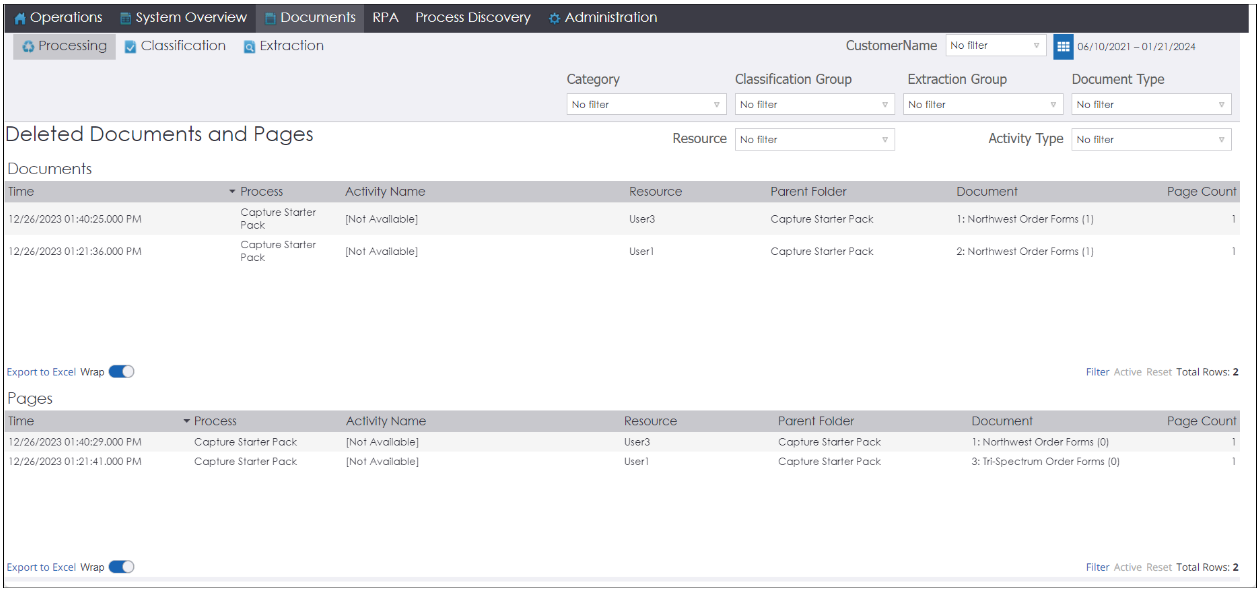
Click a row in the search results to view the details for the selected document in the Document Overview pop-up. This pop-up has information grouped under the following tabs: General, Capture Activities, Capture Events, Field Changes, and Field Values.

Deleted Documents and Pages

Use the Deleted Pages and Documents view to see all documents and pages deleted from the system so that there is visibility into documents and pages that are being deleted by resources in TotalAgility. You can also view details about deleted documents and pages.

Use the Resource and Activity Type page-level filters to filter the data.

To view the list of deleted documents and pages, navigate to **Documents** > **Processing** > **Deleted Documents and Pages**.



This view displays two grids:

- The top grid lists the deleted documents with the following details: Time, Process, Activity Name, Resource, Parent Folder, Document, and Page Count. Click a row in the Documents grid to display the document overview of the selected document in a separate window. The Document Overview pop-up includes the information grouped under the General, Capture Activities, Capture Events, Field Changes, and Field Values tabs.
- The bottom grid lists the deleted pages with the following details: Time, Process, Activity Name, Resource, Parent Folder, Document, and Page Count. Click a row in the Pages grid to display the document overview for the selected page in a separate window. The Document Overview pop-up includes the information grouped under the General, Capture Activities, Capture Events, Field Changes, and Field Values tabs.

Configure an alert in Insight Admin Console for deleted documents and/or pages so that an alert is triggered in Kofax Analytics for TotalAgility after documents/pages are deleted by a resource who performs a manual activity in TotalAgility.

Rejections

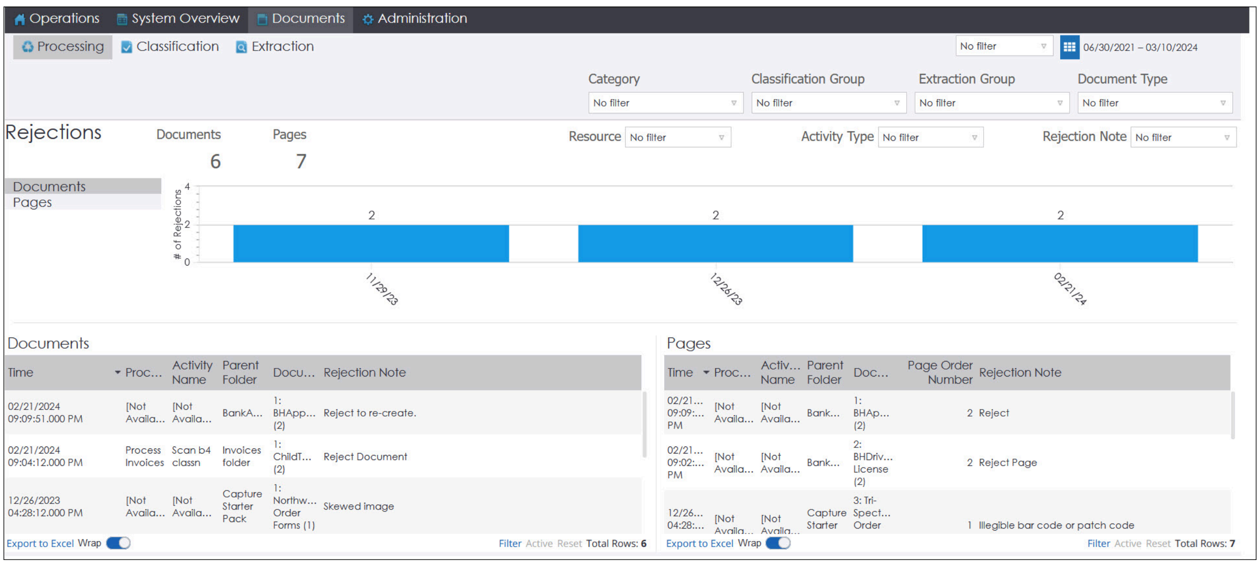
Use the Rejections view to get details related to documents, or pages that are rejected during processing so that you can quickly identify patterns and correct issues causing the rejections.

This view displays a graphical chart with rejections trending over time. You can view the documents and pages that are rejected in TotalAgility even if the document has not completed capture processing.

If a document or page is rejected and then unrejected within the same session before completing the activity, the rejected page or document is counted as rejection and appears in the Rejections view.

Change the date filter to filter the data by the event date. You can filter the data by Category, Classification Group, Extraction Group, Document Type, Resource, Activity Type, and Rejection Note.

To view the list of rejected documents and pages, navigate to **Documents** > **Processing** > **Rejections**.



Two separate grids appear that list the rejected documents, and pages that include the following details:

- **Documents**: This grid displays the event date time, process, activity name, parent folder, and rejection note.

  In the Documents grid, click a row to display the Document Overview for the selected document in a separate window. This pop-up has information grouped under the following tabs: **General**, **Capture Activities**, **Capture Events**, **Field Changes**, and **Field Values**.
- **Pages**: This grid displays the event date time, process, activity name, parent folder, page order, number, and rejection note.

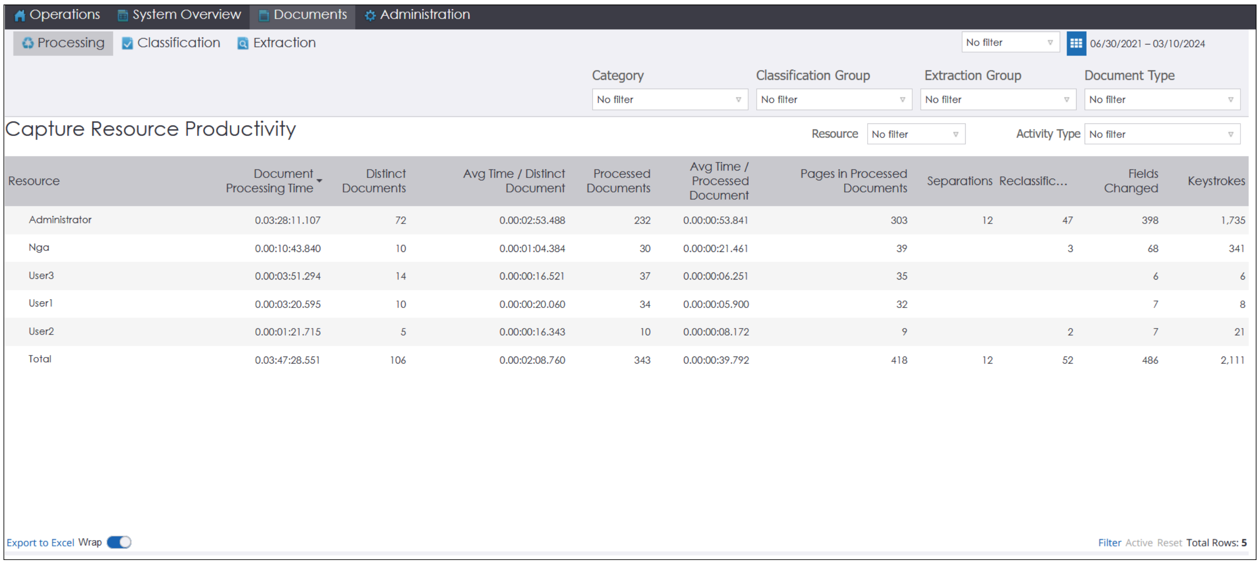
  In the Pages grid, click a row to display the Document Overview in a separate window. This window has information grouped under the following tabs: **General**, **Capture Activities**, **Capture Events**, **Field Changes**, and **Field Values**.

Resource Productivity

The Capture Resource Productivity view displays a report that provides an overview of the number of documents processed by a resource within a date/period. The report reflects capture events such as processed documents, separation corrections, reclassifications, and changed fields.

You can filter the data by Category, Classification Group, Extraction Group, Document Type, Resource, and Activity Type.

To view the productivity of a resource, navigate to **Documents** > **Processing** > **Resource Productivity**.



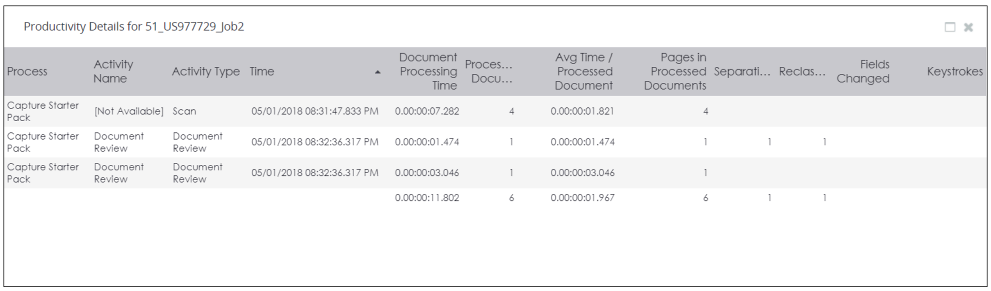
Resource	Document Processing Time	Distinct Documents	Avg Time / Distinct Document	Processed Documents	Avg Time / Processed Document	Pages in Processed Documents	Separations	Reclassific...	Fields Changed	Keystrokes
Administrator	0.03:28:11.107	72	0.00:02:53.488	232	0.00:00:53.841	303	12	47	398	1,735
Nga	0.00:10:43.840	10	0.00:01:04.384	30	0.00:00:21.461	39		3	68	341
User3	0.00:03:51.294	14	0.00:00:16.521	37	0.00:00:06.251	35			6	6
User1	0.00:03:20.595	10	0.00:00:20.060	34	0.00:00:05.900	32			7	8
User2	0.00:01:21.715	5	0.00:00:16.343	10	0.00:00:08.172	9		2	7	21
Total	0.03:47:28.551	106	0.00:02:08.760	343	0.00:00:39.792	418	12	52	486	2,111

The Capture Resource Productivity report displays the following details: Resource, Document Processing Time, Distinct Documents, Avg Time/ Processed Document, Pages in Processed Documents, Separations, Reclassifications, Fields Changed, and Keystrokes.

Click a row in the Capture Resource Productivity grid to view the productivity details for the selected resource in a separate window. For example, to view the productivity details of the Administrator, click Administrator in the grid. The Productivity Details for Administrator window includes the following details: Process, Activity Name, Activity Type, Time, Document Processing Time, Processed Documents, Average Time/Processed Document, Pages in Processed Documents, Separations, Reclassifications, Fields Changed, and Keystrokes.

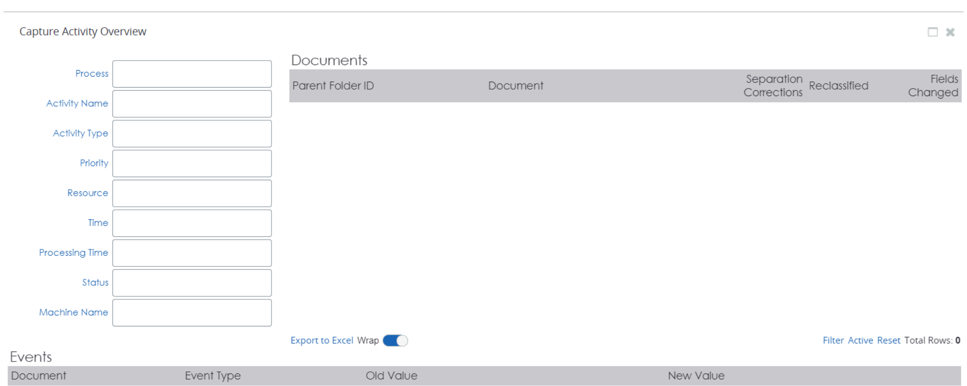
The bottom of the grid displays the total for the following fields: document processing time, number of documents, average time for processing documents, pages in processed documents, separations, fields changed, and keystrokes.

- When a resource logs into any manual capture activity, the session times are cumulative for that resource.
- When a resource confirms a document type in a manual activity such as Document Review, the count of processed documents is incremented.
- When a resource corrects a separation error in any manual activity, the count of separations is incremented.
- When a resource reclassifies a document in any manual activity, the count of reclassifications is incremented.
- When a resource corrects a document index field in a manual activity, the count of fields changed is incremented.


Productivity Details for 51_US977729_Job2

Process	Activity Name	Activity Type	Time	Document Processing Time	Proces... Docu...	Avg Time / Processed Document	Pages in Processed Documents	Separati...	Reclas...	Fields Changed	Keystrokes
Capture Starter Pack	[Not Available]	Scan	05/01/2018 08:31:47.833 PM	0.00:00:07.282	4	0.00:00:01.821	4				
Capture Starter Pack	Document Review	Document Review	05/01/2018 08:32:36.317 PM	0.00:00:01.474	1	0.00:00:01.474	1	1	1		
Capture Starter Pack	Document Review	Document Review	05/01/2018 08:32:36.317 PM	0.00:00:03.046	1	0.00:00:03.046	1				
				0.00:00:11.802	6	0.00:00:01.967	6	1	1		

To further drill down the data, click a row in the **Productivity Details for** <Resource> grid. The **Capture Activity Overview** displays the details for the selected capture activity and the associated documents and events. The data in this report shows all sessions from manual capture activities including live documents. Separate grids are displayed for the documents and events.



In the Documents grid or Events grid, click a row to display the Document Overview for the selected document or event in a separate window. This window includes information grouped under the following tabs: General, Capture Activities, Capture Events, Field Changes, and Field Values.

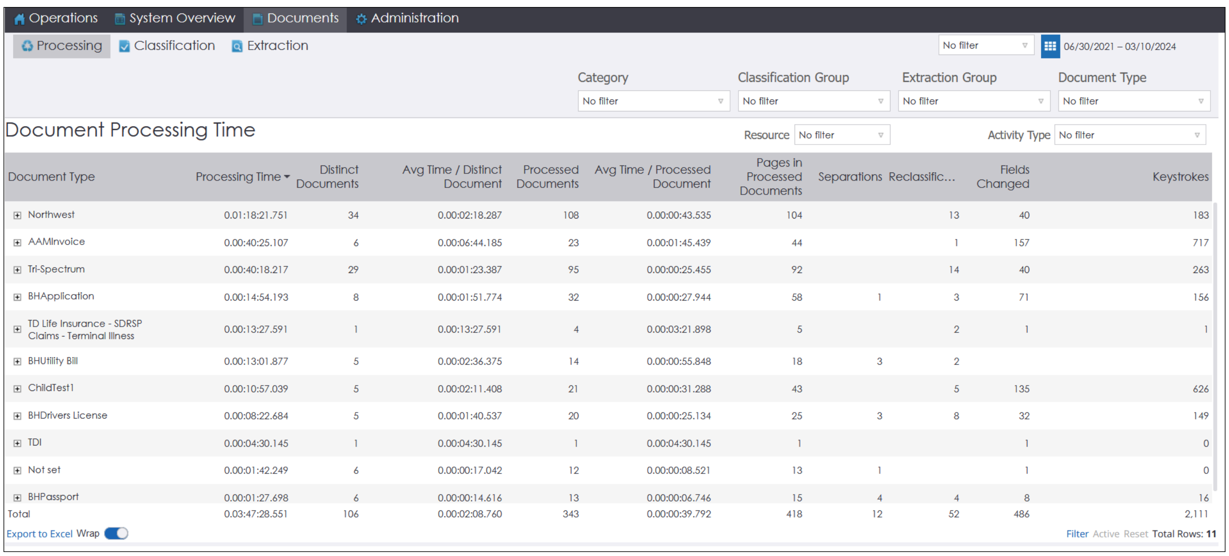
Document Processing Time

Use the Document Processing Time view to review the time taken by the documents to complete processing in TotalAgility. This view displays processed documents for interactive activities. The processed documents for automatic activities are not displayed.

The textual chart displays the total and average processing time, separations, reclassifications, and fields changed. TotalAgility reflects the clock time for the activities whereas the document processing time in Kofax Analytics for TotalAgility reflects the total processing time of documents and includes the corrections and time spent viewing each document. For example, if an activity processes three documents, the document processing time would be the sum of the processing time for all three documents.

You can filter the data by Category, Classification Group, Extraction Group, Document Type, Resource (multi-select and search), and Activity Type.

To view the processing time of documents, navigate to **Documents** > **Processing** > **Document Processing Time**.



Document Type	Processing Time	Distinct Documents	Avg Time / Distinct Document	Processed Documents	Avg Time / Processed Document	Pages in Processed Documents	Separations	Reclassific...	Fields Changed	Keystrokes
Northwest	0.01:18:21.751	34	0.00:02:18.287	108	0.00:00:43.535	104		13	40	183
AAMInvoice	0.00:40:25.107	6	0.00:06:44.185	23	0.00:01:45.439	44		1	157	717
Tri-Spectrum	0.00:40:18.217	29	0.00:01:23.387	95	0.00:00:25.455	92		14	40	263
BHApplication	0.00:14:54.193	8	0.00:01:51.774	32	0.00:00:27.944	58	1	3	71	156
TD Life Insurance - SDRSP Claims - Terminal Illness	0.00:13:27.591	1	0.00:13:27.591	4	0.00:03:21.898	5		2	1	1
BHUtility Bill	0.00:13:01.877	5	0.00:02:36.375	14	0.00:00:55.848	18	3	2		
ChildTest1	0.00:10:57.039	5	0.00:02:11.408	21	0.00:00:31.288	43		5	135	626
BHDrivers License	0.00:08:22.684	5	0.00:01:40.537	20	0.00:00:25.134	25	3	8	32	149
TDI	0.00:04:30.145	1	0.00:04:30.145	1	0.00:04:30.145	1			1	0
Not set	0.00:01:42.249	6	0.00:00:17.042	12	0.00:00:08.521	13	1		1	0
BHPassport	0.00:01:27.698	6	0.00:00:14.616	13	0.00:00:06.746	15	4	4	8	16
Total	0.03:47:28.551	106	0.00:02:08.760	343	0.00:00:39.792	418	12	52	486	2,111

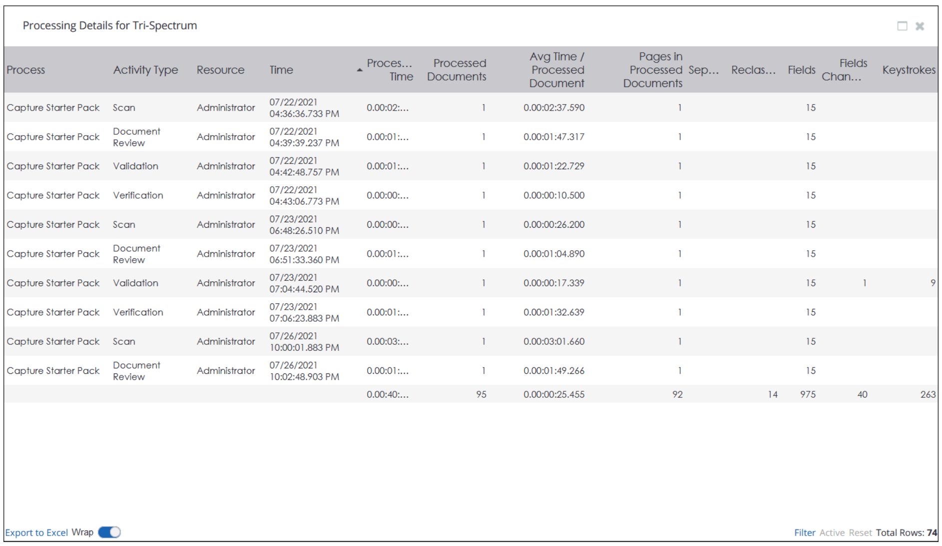
The Document Processing Time view displays the following details: Document type, Processing Time, Distinct Documents, Avg Time/Distinct Document, Processed Documents, Avg Time/Processed Document, Pages in Processed Documents, Separations, Reclassifications, Fields Changed, and Keystrokes.

Each row in this view represents a document type. Expand any row to view the resource names and the total processing time. Click a document type or resource to drill down to document processing details, and then drill further to the Capture Activity Overview as needed. The Capture Activity Overview lists the details of the selected capture activity and the associated documents and events.

Processing Details pop-up

Click a row in the Document Processing Time grid to view details for the aggregated data in the Processing Details for <Document Type> pop-up. If you expand any row for the document type and click the resource name, the Processing Details for <Resource; Document Type> pop-up appears.

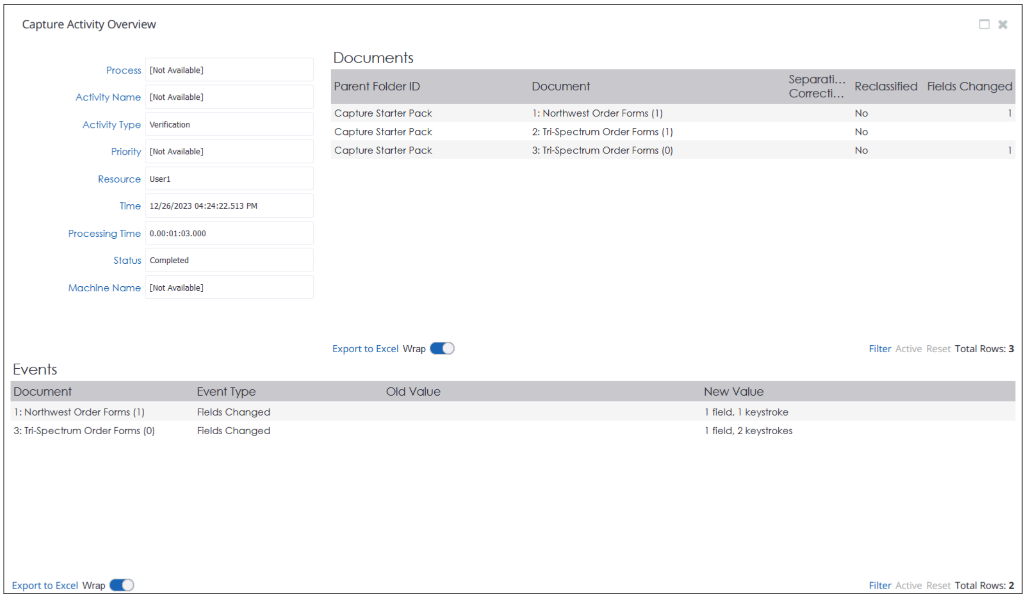
The pop-up displays the following details: Process, Activity type, Resources, Time, Processing Time, Processed Documents, Average Time/Processed Document, Pages in Processed Documents, Separations, Reclassifications, Fields, Fields Changed, and Keystrokes.


Processing Details for Tri-Spectrum

Process	Activity Type	Resource	Time	Proces... Time	Processed Documents	Avg Time / Processed Document	Pages in Processed Documents	Sep...	Reclas...	Fields	Fields Chan...	Keystrokes
Capture Starter Pack	Scan	Administrator	07/22/2021 04:36:36.733 PM	0.00:02:...	1	0.00:02:37.590	1			15		
Capture Starter Pack	Document Review	Administrator	07/22/2021 04:39:39.237 PM	0.00:01:...	1	0.00:01:47.317	1			15		
Capture Starter Pack	Validation	Administrator	07/22/2021 04:42:48.757 PM	0.00:01:...	1	0.00:01:22.729	1			15		
Capture Starter Pack	Verification	Administrator	07/22/2021 04:43:06.773 PM	0.00:00:...	1	0.00:00:10.500	1			15		
Capture Starter Pack	Scan	Administrator	07/23/2021 06:48:26.510 PM	0.00:00:...	1	0.00:00:26.200	1			15		
Capture Starter Pack	Document Review	Administrator	07/23/2021 06:51:33.360 PM	0.00:01:...	1	0.00:01:04.890	1			15		
Capture Starter Pack	Validation	Administrator	07/23/2021 07:04:44.520 PM	0.00:00:...	1	0.00:00:17.339	1			15	1	9
Capture Starter Pack	Verification	Administrator	07/23/2021 07:06:23.883 PM	0.00:01:...	1	0.00:01:32.639	1			15		
Capture Starter Pack	Scan	Administrator	07/26/2021 10:00:01.883 PM	0.00:03:...	1	0.00:03:01.660	1			15		
Capture Starter Pack	Document Review	Administrator	07/26/2021 10:02:48.903 PM	0.00:01:...	1	0.00:01:49.266	1			15		
				0.00:40:...	95	0.00:00:25.455	92		14	975	40	263

Export to Excel Wrap Filter Active Reset Total Rows: 74

To further drill down the data, click a row in the Processing Details window. The Capture Activity Overview appears in a separate window, showing the details of the selected capture activity and the associated documents and events. Separate grids are displayed for the documents and events.



In the Documents grid or Events grid, select a row to display the document overview for the selected document or event. The Document Overview pop-up includes information grouped under the following tabs: General, Capture Activities, Capture Events, Field Changes, and Field Values.

Document Overview window

The Document Overview provides an audit trail for a specific document so that you can easily view the changes made to the document in TotalAgility. The Document Overview window displays only one document overview at a time. If you select a different document from a subsequent activity overview, it does not contain any data.

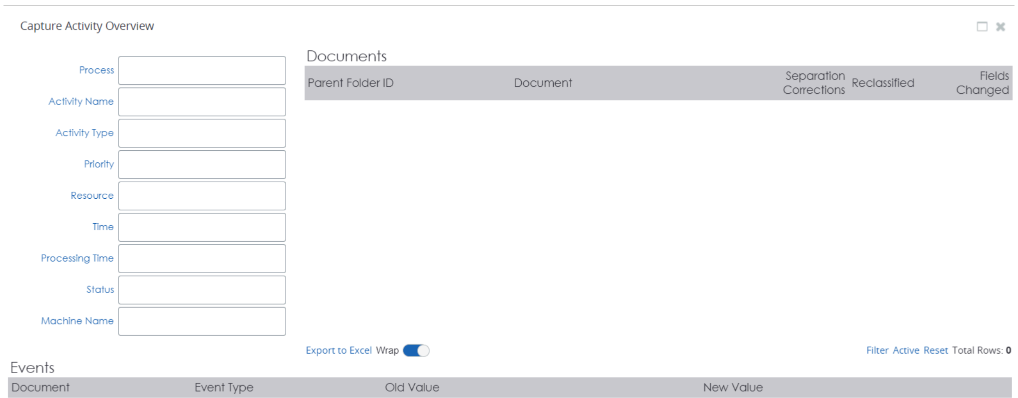
The Document Overview window information is grouped under the following tabs:

Tab	Information
General	This tab displays the following information: • Category • Document Type • Classification Group • Extraction Group • Page Count • System Classified • Classified Document Type • Classified Confidence • Confidently Classified • Processing Time • Separation Corrections Count • Reclassified • Fields Changed • Capture Complete (Date/time) • Full Folder ID • Document ID • Repository Document ID
Capture Activities	This tab displays two grids: The top grid provides the list of capture activities that touched the document including the following details: • Process Name • Activity • Activity Type • Time • Processing Time When you select an activity in the top grid, the bottom grid displays the activity sessions for the selected activity, including the following details: • Process Name • Activity • Activity Type • Resource • Time • Processing Time (Total time spent) In the Activity Sessions grid, select a session to view the details of the selected capture activity (session) and the associated documents and events in the Capture Activity Overview.

Tab	Information
Capture Events	This tab displays the events related to classification, separation, field changes, deletions, rejections, and capture complete documents: • Activity Start Time, Date • Event Type • Activity Type • Activity Name • Resource • Old Value • New Value When you select an activity (session) in the grid, details and the associated documents and events appear in the Capture Activity Overview.
Field Changes	This tab displays the list of fields changed, including the following details: • Time • Field Name • Table Name • Row • Old Value • New Value • Resource • Activity Name
Field Values	This tab displays the list of all document fields sorted by field name, including the following details: • Field Name • Table Name • Row • Value

Capture Activity Overview

The Capture Activity Overview displays the details for a specific activity (session) in Kofax Analytics for TotalAgility so that you can easily see the events that have occurred in TotalAgility, which resource is associated with which activity, when the event occurred and from which workstation. The Capture Activity Overview displays all the documents that have been touched for a given job, but the Document Overview will be displayed only for the selected document. If you select a different document from a subsequent activity overview, it does not contain any data.



When you select an activity session, the Capture Activity Overview lists the following information in a separate window:

- Process
- Activity Name
- Activity type
- Priority
- Resource
- Time
- Processing time
- Status
- Machine Name (usually it is the TotalAgility server, but for scanning it should be the scan station)

Separate grids are displayed for the documents and events. When the activity processes documents, the list of documents processed by the activity is displayed in the documents grid, which lists each document by parent folder ID, document name, separation corrections, reclassification, and count of field changes.

In the Documents grid or Events grid, click a row to display the Document Overview for the selected document or event. The Document Overview includes information grouped under the following tabs: General, Capture Activities, Capture Events, Field Changes, and Field Values.

No Touch Processing

Use the No Touch Processing view to examine the ratio of items processed without manual corrections relative to the total number of documents processed. You can see the details of documents in the No Touch Processing view so that you can validate the information in the chart.

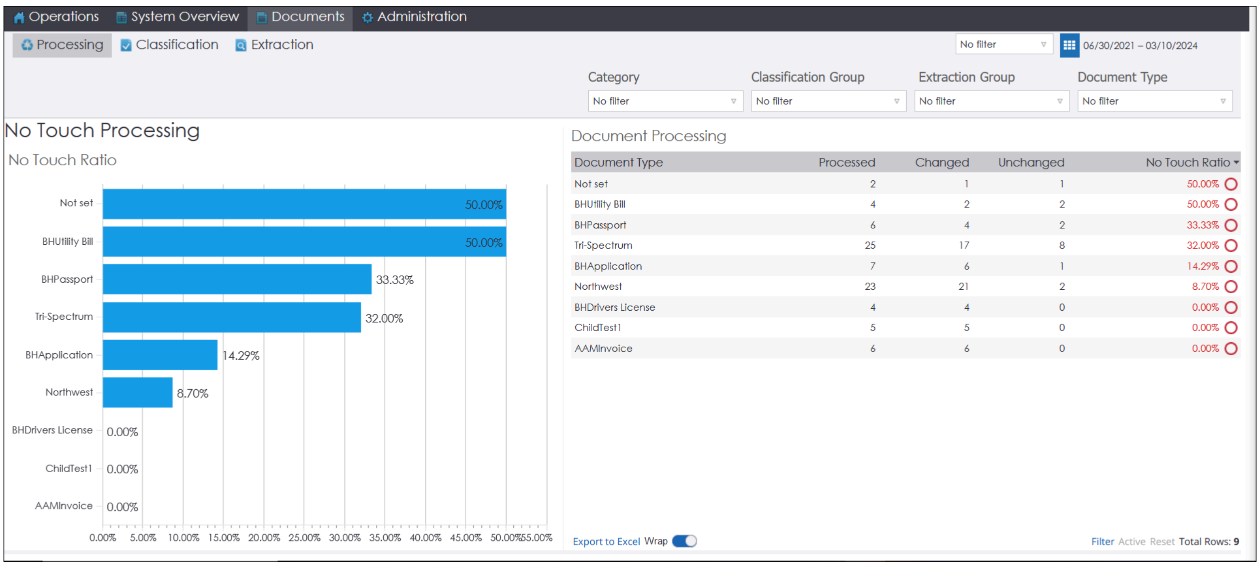
This view displays a graphical chart that shows the percentage of documents that complete capture processing without any changes by resources for manual activities. The data is based on completed documents, filtered by completion date, and grouped by document type.

Before completing capture processing, when any of the following occurs in a document in a manual activity, it is considered as touched:

- Separations (split, merged, page moved)
- Reclassified
- Field changed

You can filter the data by Category, Classification Group, Extraction Group, and Document Type.

To view the number of documents that complete capture processing, select **Documents** > **Processing** > **No Touch Processing**.



Click a row in the Document Processing grid to display the No Touch Details for <Document Type> window.

No Touch Details

When you click a row in the Document Processing grid, the details for the selected document appear in the No Touch Details for <Document Type> window, including Time, Parent Folder, Document, Separation Corrections, Reclassifications, Fields Changed, Keystrokes, Document Processing Time, and Changed.

No Touch Details for Document Decision

Time	Parent Folder	Document	Separation Corrections	Reclas...	Fields Changed	Keystrokes	Document Processing Time	Changed
05/01/2018 08:34:57.000 PM	Default Folder Type	1: Document Decision (4)	1	Yes	0	0	0.00:00:06.226	No
05/01/2018 08:31:01.000 PM	Default Folder Type	1: Document Decision (2)	0	Yes	0	0	0.00:00:00.000	No
05/01/2018 08:27:59.000 PM	Default Folder Type	1: Document Decision (2)	0	Yes	0	0	0.00:00:00.000	No
05/01/2018 08:15:56.000 PM	Default Folder Type	1: Document Decision (4)	0	Yes	0	0	0.00:00:00.000	No

To further drill down the data, in the No Touch Details for <Document Type> window, click a row to display the Document Overview, which includes the information grouped under the General, Capture Activities, Capture Events, Field Changes, and Field Values tabs.

Classification

Use the Classification submenu to access views related to different document types, processing confidence, and reclassified documents.

This view shows how well the system classifies completed documents by comparing the total number of classified documents by document type and confidence versus reclassifications by resources who perform an attended activity. The Classification view displays data only for completed documents; data related to deleted, timed out, or documents in progress is excluded

This submenu includes the following views:
- Classification Statistics
- Classification Chart
- Classification Benchmark
- Classification Trending
- Page Classification Details

You can filter the data by Category, Classification Group, Extraction Group, and Document Type.

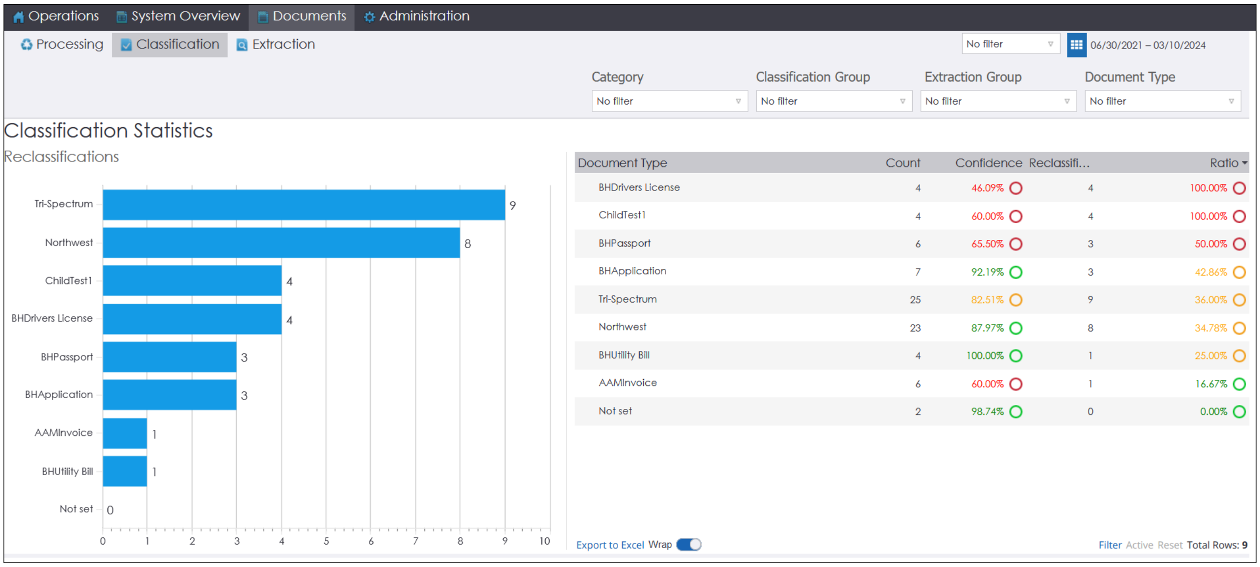
Classification Statistics

Use the Classification Statistics view to review the change ratio for documents, including the count, confidence, and the number of reclassifications.

This view displays a horizontal bar chart with reclassified documents for the final document types, and a textual chart with final document types (documents that complete capture activities in TotalAgility) after the next hourly execution plan runs. A separate grid displays the following details related to reclassified documents for the selected document type: Document Type, Count, Confidence, Reclassifications, and Ratio.

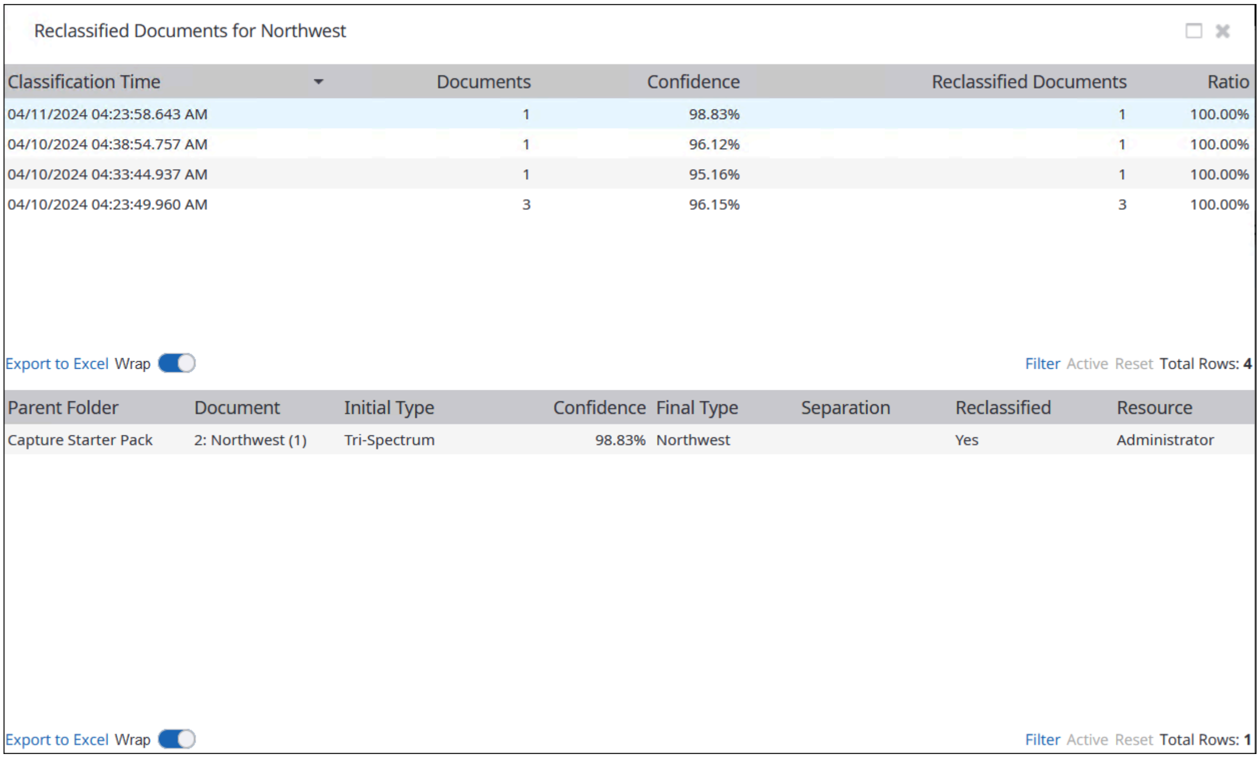
You can filter the data by Category, Classification Group, Extraction Group, and Document Type.

To view the classification statistics, navigate to **Documents** > **Classification** > **Statistics**.



If you modify the date filter, the data in the Classification view is updated based on the capture completion date. Click the bar chart to drill down the data by initial document type and the resource who reclassified the document.

Click a document type in the grid to view the reclassified documents for the selected document type. The following details are displayed in a separate grid for the selected reclassified document: Parent Folder, Document, Initial Type, Confidence, Final Type, Separation, Reclassification, and Resource.


Reclassified Documents for Northwest

Classification Time	Documents	Confidence	Reclassified Documents	Ratio
04/11/2024 04:23:58.643 AM	1	98.83%	1	100.00%
04/10/2024 04:38:54.757 AM	1	96.12%	1	100.00%
04/10/2024 04:33:44.937 AM	1	95.16%	1	100.00%
04/10/2024 04:23:49.960 AM	3	96.15%	3	100.00%

Export to Excel Wrap Filter Active Reset Total Rows: 4

Parent Folder	Document	Initial Type	Confidence	Final Type	Separation	Reclassified	Resource
Capture Starter Pack	2: Northwest (1)	Tri-Spectrum	98.83%	Northwest		Yes	Administrator

Export to Excel Wrap Filter Active Reset Total Rows: 1

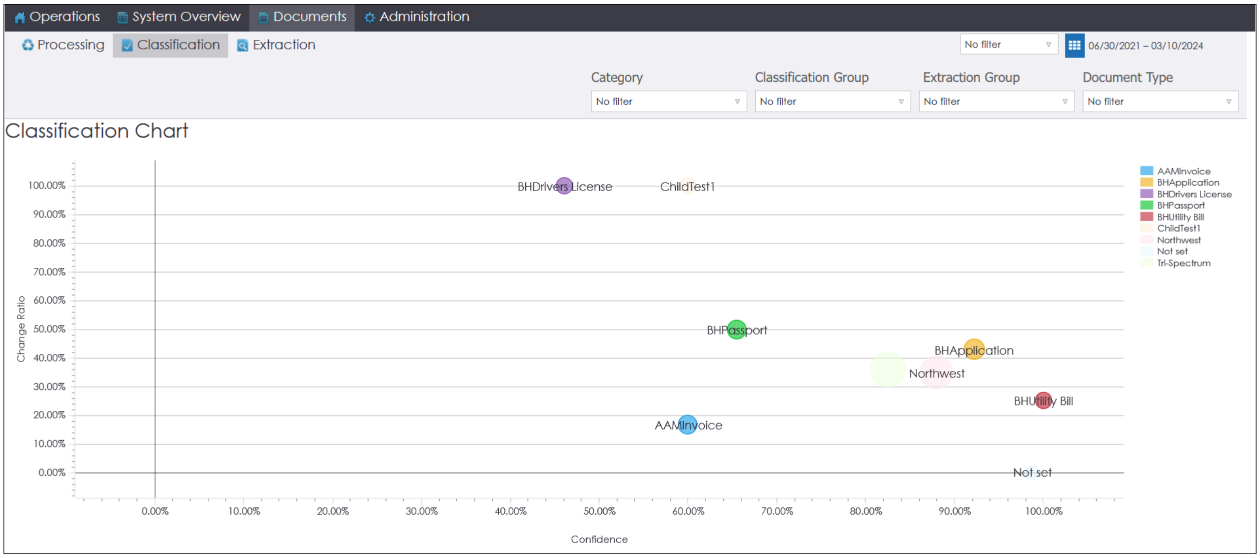
When you click a row in the bottom grid, the Document Overview lists information grouped under the following tabs: General, Capture Activities, Capture Events, Field Changes, and Field Values.

Classification Chart

Use the Classification Chart view to analyze the change ratio and confidence for a document type.

This view displays a bubble chart with classification confidence and change ratio (in manual activities) relative to the number of documents processed (size of the bubble) for each document type. The document types in this view represent the final document types.

To view the classification chart, navigate to **Documents** > **Classification** > **Chart**.



When you click a document type in the legend, the chart is dynamically updated with the selected document type being excluded from the chart, and the selected document type is grayed out from the legend.

Click a document type (bubble) on the chart to further drill down the data by initial document type and resource.

Classification Benchmark

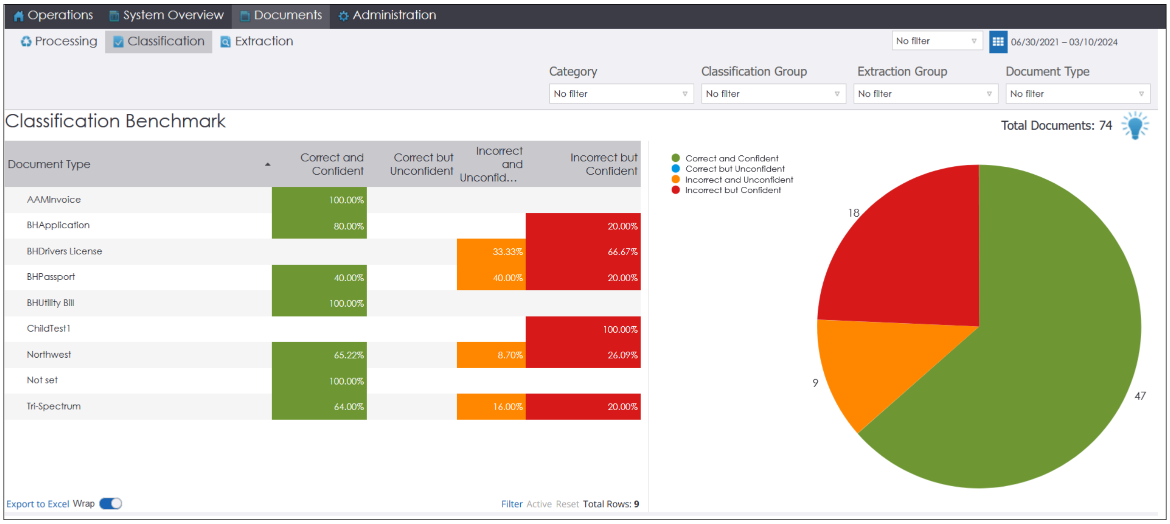
Use the Classification Benchmark view to examine overall classification accuracy based on document types.

Based on this view, you can determine how many document types were accurately classified by the system, along with the number of document types that required corrections in manual activities performed by the operator.

To view the classification benchmark for document types, navigate to **Documents** > **Classification** > **Benchmark**.

This view displays the textual chart with classification accuracy broken down by document type expressed as a percentage and displayed as a pie chart. If you click a document type in the classification statistics grid, the pie chart is refreshed to show the classification details for the selected document type.

The total number of documents represented in the view is displayed above the pie chart.



Accuracy	Description
Correct and Confident (Green)	The document is correct and confidently classified by the TotalAgility system, and is completed without any changes or corrections.
Correct but Unconfident (Blue)	The document is correct yet not classified confidently by the TotalAgility system, and is completed without any changes or corrections.
Incorrect and Unconfident (Orange)	The document is incorrect and is not classified confidently by the TotalAgility system, and later reclassified by a resource in a manual activity.
Incorrect and Confident (Red)	The document is incorrect yet classified confidently by the TotalAgility system, and later reclassified by a resource in a manual activity.

When you click a document type in the Classification Benchmark grid, the pie chart is updated with details about the selected document type. Click a segment on the pie chart to drill down the data by category, document type, and initial document type.

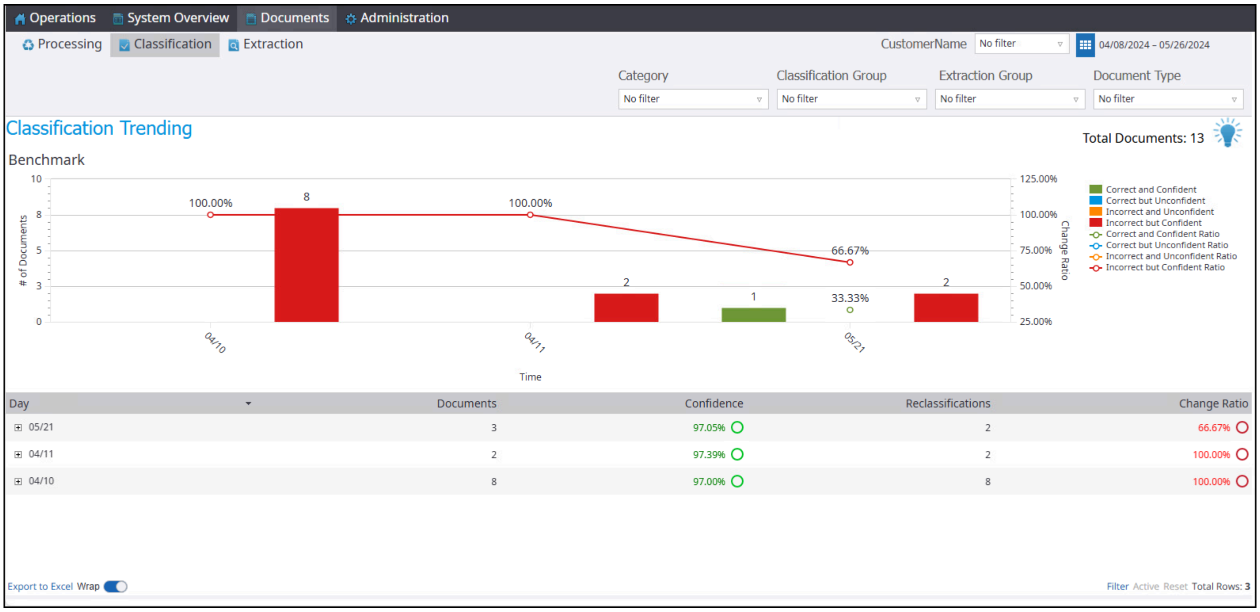
Click to display the Classification Benchmark Help pop-up that explains the four combinations for document types represented in the Classification Benchmark view.

Classification Trending

The Classification Trending view displays the chart with classification accuracy over time.

To view the extraction benchmark, navigate to **Documents** > **Classification** > **Trending**.

You can filter the data using the following global filters: Category, Classification Group, Extraction Group, and Document Type. Use the date filter to view the data on the dashboard based on the classification date. The default date filter is the last two weeks. The grid chart displays statistical details and can be drilled down to the document level. The bars represent the number of completed documents and the line represents the change ratio.

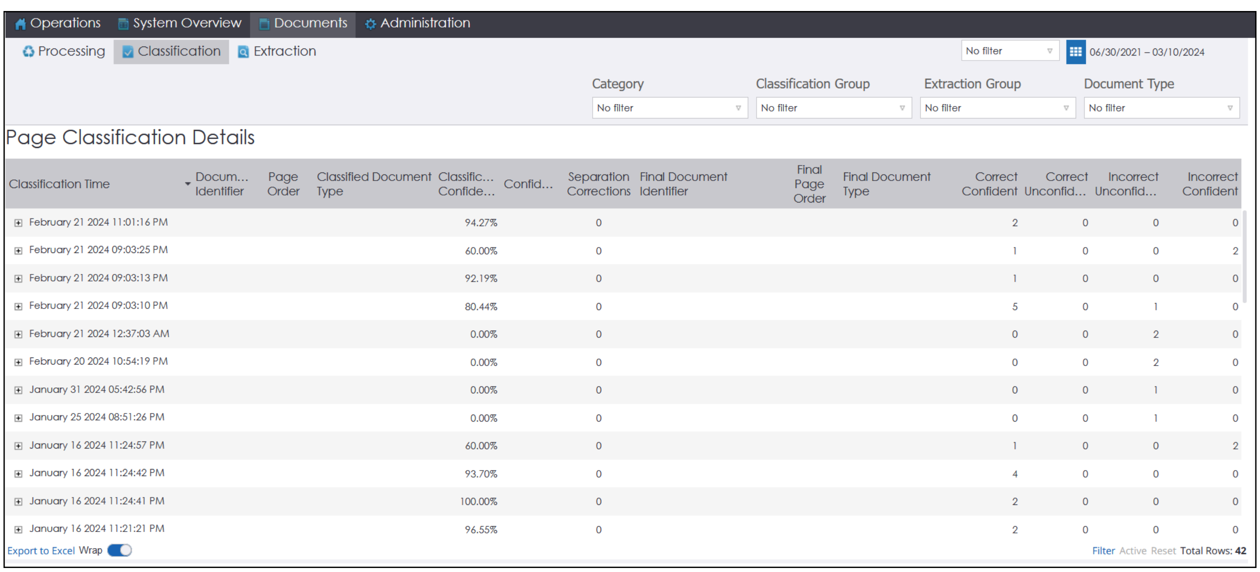


Day	Documents	Confidence	Reclassifications	Change Ratio
05/21	3	97.05%	2	66.67%
04/11	2	97.39%	2	100.00%
04/10	8	97.00%	8	100.00%

Page Classification Details

Use the Page Classification Details view to see the page-level details for classification for a better understanding of how the TotalAgility system classifies and separates the documents.

To view the Page Classification Details for document types, navigate to **Documents** > **Classification** > **Page Classification Details**.



Classification Time	Docum... Identifier	Page Order	Classified Document Type	Classific... Confide...	Confid...	Separation Corrections	Final Document Identifier	Final Page Order	Final Document Type	Correct Confident	Correct Unconfid...	Incorrect Unconfid...	Incorrect Confident
February 21 2024 11:01:16 PM				94.27%		0				2	0	0	0
February 21 2024 09:03:25 PM				60.00%		0				1	0	0	2
February 21 2024 09:03:13 PM				92.19%		0				1	0	0	0
February 21 2024 09:03:10 PM				80.44%		0				5	0	1	0
February 21 2024 12:37:03 AM				0.00%		0				0	0	2	0
February 20 2024 10:54:19 PM				0.00%		0				0	0	2	0
January 31 2024 05:42:56 PM				0.00%		0				0	0	1	0
January 25 2024 08:51:26 PM				0.00%		0				0	0	1	0
January 16 2024 11:24:57 PM				60.00%		0				1	0	0	2
January 16 2024 11:24:42 PM				93.70%		0				4	0	0	0
January 16 2024 11:24:41 PM				100.00%		0				2	0	0	0
January 16 2024 11:21:21 PM				96.55%		0				2	0	0	0

For every document classified and completed in TotalAgility, this view displays the following page-level details:

- Classification Time

- Document identifier
- Page Order
- Classified Document Type
- Classification confidence (%)
- Confident (Boolean)
- Separation Corrections
- Final Document Identifier
- Final Page Order
- Final Document Type
- Correct Confident
- Correct UnConfident
- InCorrect UnConfident
- InCorrect Confident

When documents complete classification and export, the Page Classification Details view groups the documents in the record grid by the date/time when the classification activity is completed.

If you modify the date filter, the data in the Page Classification Details view is updated based on the capture completion date.

In the Page Classification Details grid, you can expand the grouped row to view separate rows for each page in the document. When you click a row, the Document Overview pop-up appears that includes information grouped under the following tabs: General, Capture Activities, Capture Events, Field Changes, and Field Values.

Extraction

Use the Extraction submenu to access views that detail how well the system extracts data from the documents completed in TotalAgility. The graphical view displays the extraction performed in TotalAgility and helps in identifying and making improvements to the process map/extraction group. When you change the date range on the Kofax Analytics for TotalAgility dashboard, the Extraction view reflects the data based on the capture completion date.

This submenu includes the following views:

- Extraction Statistics
- Extraction Chart
- Extraction Benchmark
- Extraction Trending

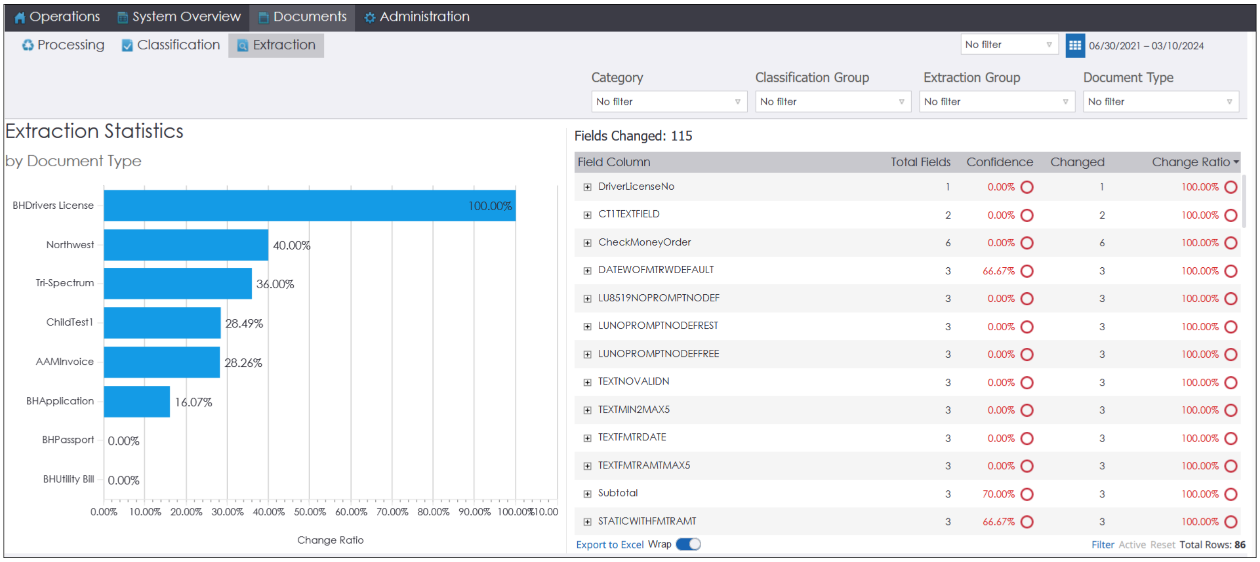
You can filter the data by category, classification group, extraction group, and document type.

Extraction Statistics

The Extraction Statistics view displays a list of all fields for the selected document type. When the fields are extracted in TotalAgility, the extracted fields are listed as columns in the Extraction Statistics metric grid. When viewing the change ratio bar chart, the labels reflect the individual document type.

You can filter the data by Category, Classification Group, Extraction Group, and Document Type.

To view the extraction statistics, navigate to **Documents** > **Extraction** > **Statistics**.



When you click a document type in the bar chart, the system displays the count of field changes and field statistics, including the change ratio for field-level data associated with the selected document type. You can expand the field name in the metrics grid to view the associated extraction group and document type.

Refer to the following table for the field statistics.

Field Statistics Column	Description
Field Column	Name of the field.
Total Fields	Count of all fields with the given name in all exported documents, based on the currently selected filters, including date, batch class, site, and document type.
Confidence	Average field extraction confidence value in all exported documents, based on the currently selected filters, including date, batch class, site, and document type.
Changed	Count of all fields with the given name that are changed manually in all exported documents, based on the currently selected filters, including date, batch class, site, and document type.
Change Ratio	The ratio of the Changed Column to the Total Fields column.

When you click a field name in the Fields Changed grid, the Changed Field Details: <Field Name> window displays the details for the selected field so that you can validate the summarized data. For example, if you click the CustomerName row in the grid, the Changed Field Details: CustomerName window displays the details for the changed fields.

The window has two grids. The top grid displays a list of activities containing documents that had field changes. The details include process, activity type, activity name, activity end date/time, and fields changed.

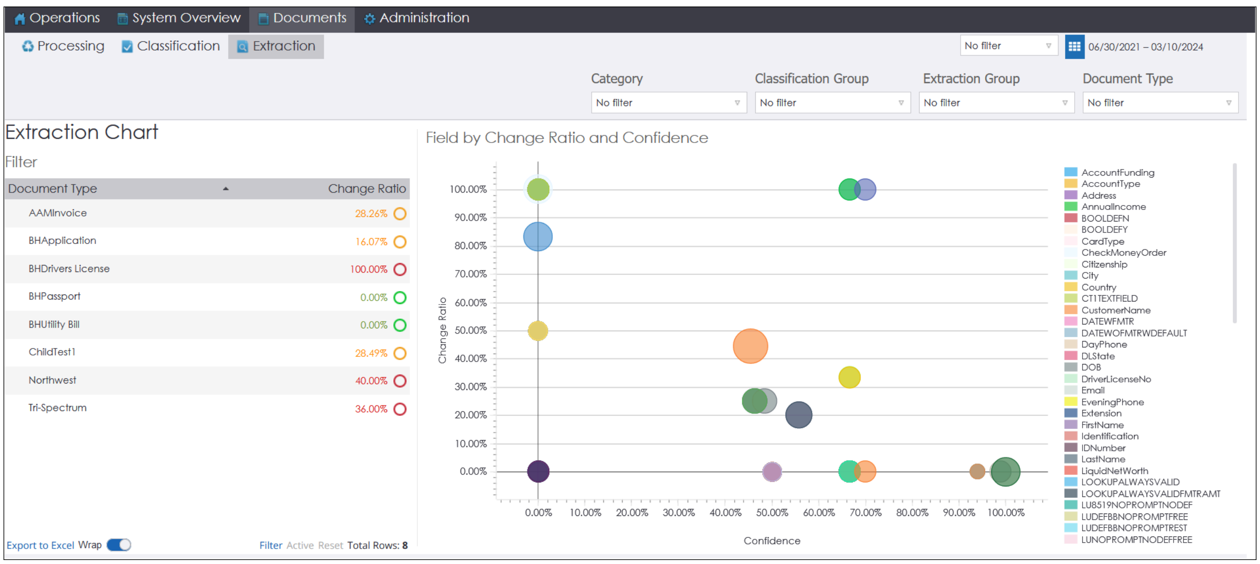
When you click an activity, the bottom grid populates all changes made to that field for the selected activity. The details include parent folder, document identifier, field name, table name, row, confidence, old value, and new value.

When you click a row in the grid, the Document Overview window lists the information grouped under the following tabs: General, Capture Activities, Capture Events, Field Changes, and Field Values.

Extraction Chart

The Extraction Chart view displays a textual chart that lists document types and a change ratio, and a bubble chart with the percentage of fields changed for each document type.

To view the change ratio of document types, navigate to **Documents** > **Extraction** > **Chart**.



- The Y-axis shows the change ratio.
- The X-axis shows the field confidence.
- The bubble size shows the number of fields changed.

Use the date filter to view the data on the dashboard based on the capture completion date.

When you select a document type in the Extraction Chart grid, the bubble chart is updated based on the confidence and change ratio for the selected document type.

Extraction Benchmark

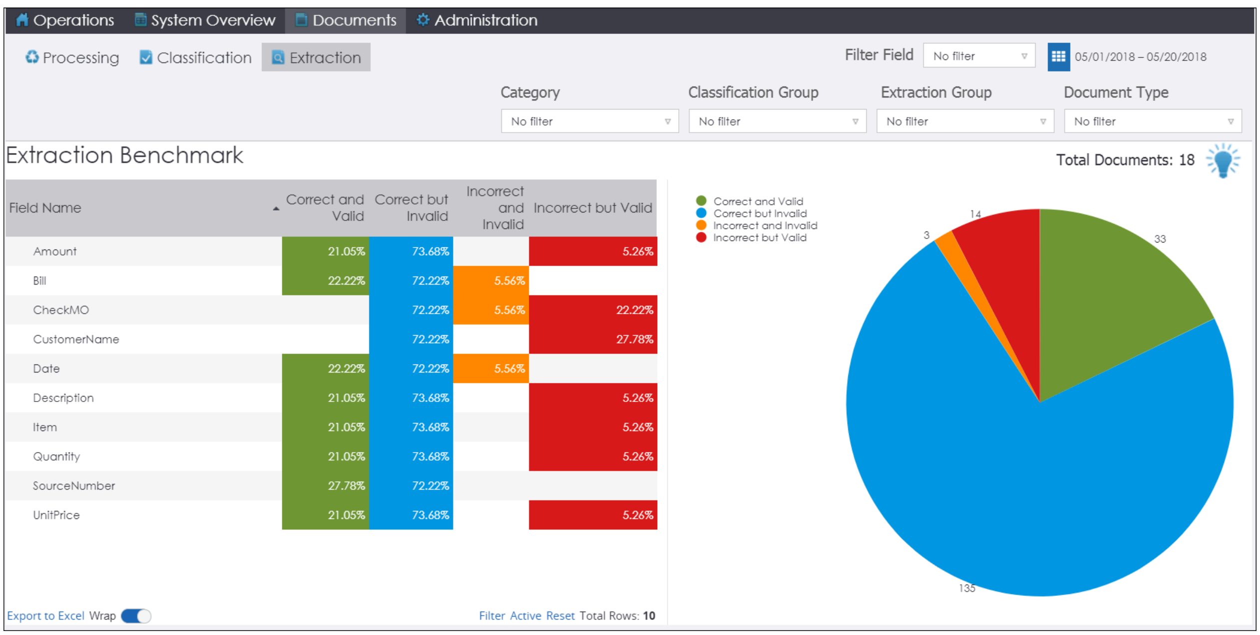
The Extraction Benchmark view helps to understand how well TotalAgility extracts the data while factoring the user experience, which can include making corrections or confirming invalid fields in manual activities.

To view the extraction benchmark, navigate to **Documents** > **Extraction** > **Benchmark**.

This view displays the textual chart with field names and a pie chart with details about the selected field name.

The following colors represent whether a field is valid or invalid:

- **Green**: When an extracted field is valid in TotalAgility, and completed without any changes or corrections, the field name is reflected in the Extraction Benchmark view as Correct and Valid.
- **Blue**: When an extracted field is invalid in TotalAgility and completed without any changes or corrections, the field name is reflected in the Extraction Benchmark view as Correct but Invalid.
- **Orange**: When an extracted field is invalid in TotalAgility and changed in a manual activity, the field name is reflected in the Extraction Benchmark view as Incorrect and Invalid.
- **Red**: When an extracted field is Valid in TotalAgility and changed in a manual activity, the field name is reflected in the Extraction Benchmark view as Incorrect but Valid.



When you click a field name in the Extraction Benchmark grid, the pie chart is updated with details about the selected field. Click a segment on the pie chart to drill down the data by document type and the resource who reclassified the document.

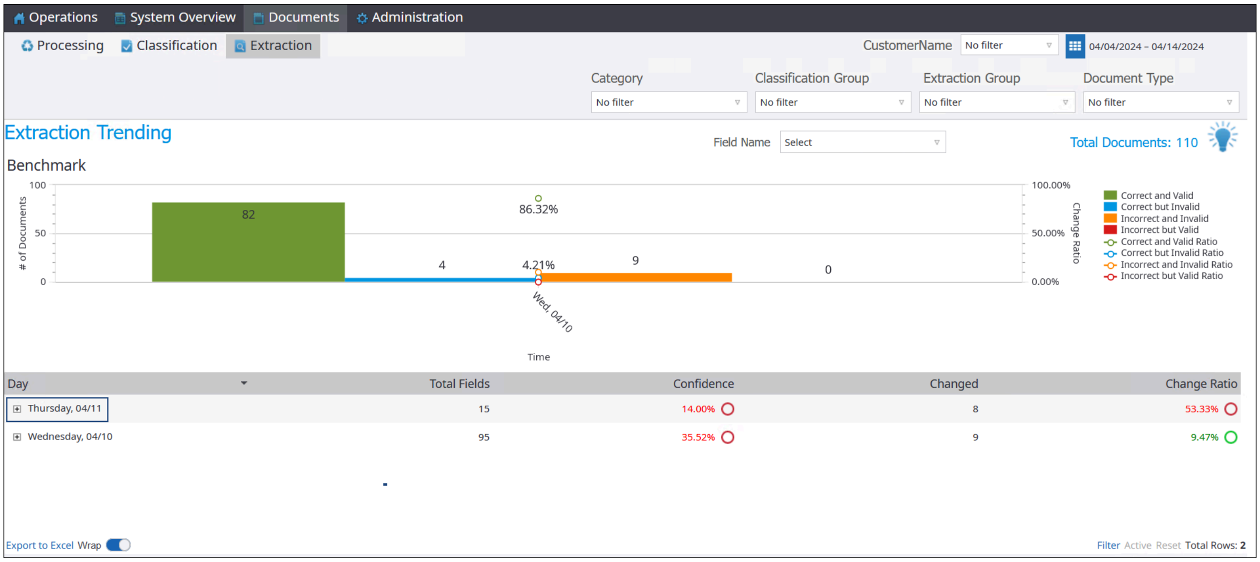
> Click the lightbulb icon to display an explanation of the four-color combinations for field names represented in the Extraction Benchmark view.

Extraction Trending

The Extraction Trending view displays the chart with extraction accuracy over time.

To view the extraction benchmark, navigate to **Documents** > **Extraction** > **Trending**.

You can filter the data using the following global filters: Category, Classification Group, Extraction Group, and Document Type. Use the date filter to view the data on the dashboard based on the Capture completion date. The default date filter is the last two weeks. The height of the bars represents the number of extracted fields. The line represents the change ratio. The grid chart shows statistical details by day and can be drilled down to field and document type level.



Administration

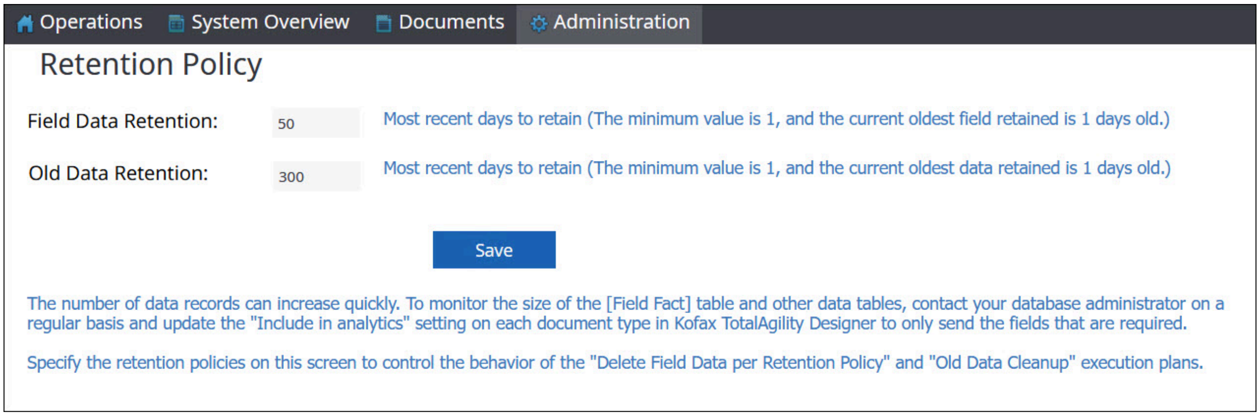
The Administration menu includes the following views:

- Data Retention
- Filter Field

Data Retention

Use the Data Retention view to define a retention policy for the field and document records. Retention policy helps to manage storage requirements and improve performance over time without compromising the data integrity.

To define the retention policy for fields and other data, navigate to **Administration** > **Retention Policy** .



Do the following to define the retention period:

- **Field Data Retention**: Specify the most recent number of days to retain the records and click **Save**. The default value is 5, the minimum is 1, and the current oldest field retained is [Count] days old.

  When the old field records that are older than X days are deleted, all field records for Capture completed documents older than X days are deleted.
- **Old Data Retention**: Specify the most recent number of days to retain the old data and click **Save**. The minimum value is 30, and the current oldest data retained is [Count] days old.

The two delete execution plans related to the field and old data are also scheduled automatically as follows:

- **Delete Field Data per Retention Policy:** Every Night at 0:0 AM.
- **Old Data Cleanup Plan:** Every Night at 0:0 AM.

If one of the above plans is not scheduled, the hourly plan fails to load the data.

The number of data records can increase quickly. To monitor the size of the [Filed Fact] table and other data tables, contact your database administrator on a regular basis and update the "Include in analytics" setting on each document type in TotalAgility Designer to only send the fields that are required.

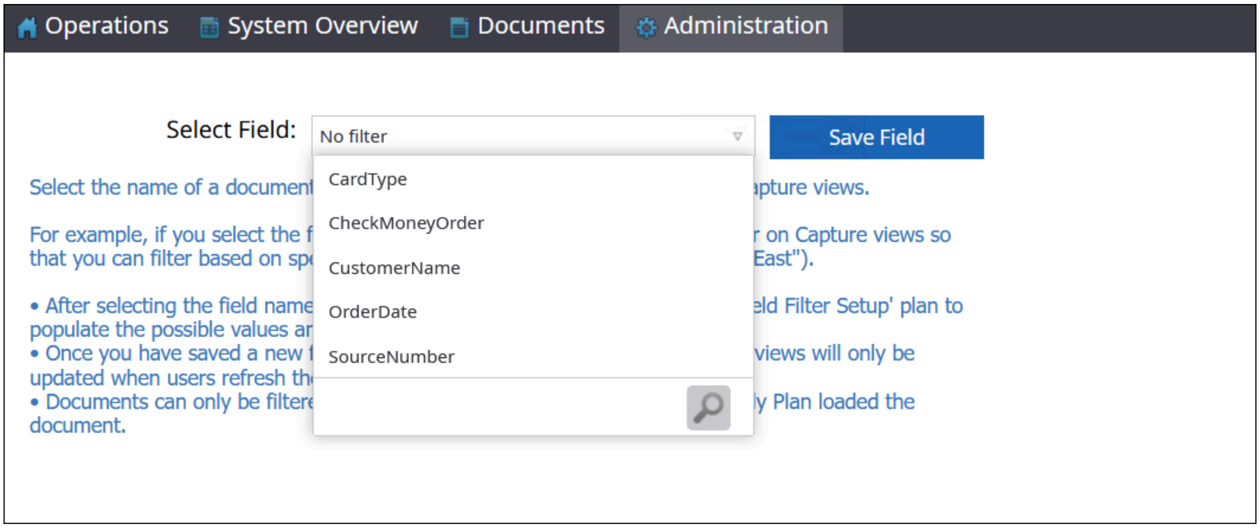
An administrator can manually delete the old field records from the Insight Data Loader.

Filter Field

Use the Filter Field view to specify a special filter field that can be used for filtering the data that appears on all Capture views in Kofax Analytics for TotalAgility. This helps you to analyze Capture processing views by field values rather than just field names.

The Filter Field option is only available if you have the Administrator role. When you specify a filter field, all the completed data for that field will be available in the Kofax Analytics for TotalAgility views as a filter. When you filter the views using the field filter, the views reflect statistics for the documents matching the filtered field.

To specify a filter field, navigate to **Administration** > **Filter Field**.



On the **Select Field** list, select a field and click **Save Field**. On saving the filed, the **Document Field Filter Setup** plan is run to populate the possible values, and this may take some time to run. Once the plan runs, the filter on Capture views is only updated if you refresh the browser. The documents can only be filtered on the field that was set at the time the Hourly Plan loaded the document.

The saved filter field name appears on all the Capture views. The saved filter field can only be applied to the newly loaded data. For example, if you select the field name "Region," there will be a Region filter on Capture view so that you can filter the data based on the specific region.

Chapter 4

Record definitions

This section lists records that are available for use in Kofax Analytics for TotalAgility views.

- Activity record
- Job record
- Document record
- Field Fact record
- Resource Group record
- Queue record
- Session record

Activity record

The Activity record is a combination of the following records:

- Activity1 - Source table = LIVE_ACTIVITY; Source Database = TotalAgility
- Activity2 - Source table = FINISHED_JOB_HISTORY; Source Database = TotalAgilityFinished
- Activity3 - Source table = JOB_HISTORY; Source Database = TotalAgility

The Activity 1, Activity 2, and Activity 3 records are temporary utility tables and should not be used as data sources for any custom records/metrics because their contents are completely refreshed with every hourly data load.

The Activity1 record stores the following fields.

Activity1 Record	Source Column in LIVE_ACTIVITY table
EMBEDDED_PROCESS_COUNT	EMBEDDED_PROCESS_COUNT
NODE_ID	NODE_ID
ACTIVITY_STATUS	For Activity1, the status is set from ACTIVITY_STATUS, and for Activity2 and Activity3, the status is -1.
AUTOMATIC	AUTOMATIC
DUE_DATE	DUE_DATE
COMPLETED_DATE	For Activity1, the value of this record is null, and for Activity2 and Activity3, the value is set from SET_TIME.

Activity1 Record	Source Column in LIVE_ACTIVITY table
EXPECTED_COST	EXPECTED_COST
EXPECTED_DURATION_IN_SECONDS	• For Activity1, the expected duration is from the EXPECTED_DURATION_IN_SECONDS column. • For Activity2, it is from the TARGET_TIME_IN_SECONDS column.
NODE_NAME	NODE_NAME
PRIORITY	For Activity1, the priority is from the PRIORITY column, and for Activity2 and Activity3, the value is 1.
PROCESS_NAME	PROCESS_NAME

SLA_STATUS	• For Activity1:
	  • 4: If the current date time is greater than SLA_STATUS5_DATE
	  • 3; If the current date time is less than SLA_STATUS5_DATE but greater than SLA_STATUS4_DATE
	  • 2: If the current date time is less than [LIVE_ACTIVITY].[SLA_STATUS4_DATE], and greater than or equal to [LIVE_ACTIVITY].[SLA_STATUS3_DATE]
	  • 1: If the current date time is less than [LIVE_ACTIVITY].[SLA_STATUS3_DATE], and greater than or equal to [LIVE_ACTIVITY].[SLA_STATUS2_DATE]
	  • 0: If the current date time is less than [LIVE_ACTIVITY].[SLA_STATUS2_DATE]
	  • -1: For all other cases.
	• For Activity2 and Activity3, the value is 0.

TYPE	For Activity1, the type is from the TYPE column, and for Activity2 and Activity3, it is from the ACTIVITY_TYPE column.
VERSION	VERSION
PENDING_TIME	For Activity1, the time is from the PENDING_TIME column, and for Activity2 and Activity3, the time is calculated from the TIME_PENDING_IN_SECS and SET_TIME columns.
PENDING_TIME_IN_SECONDS	For Activity1, the time is calculated from the PENDING_TIME column, and for Activity2, it is calculated from TIME_PENDING_IN_SECS.
TAKEN_TIME	For Activity1, the time is from TAKEN_TIME, and for Activity2 and Activity3, it is NULL.
PROCESS_ID	PROCESS NAME + PROCESS_ID as a string.
JOB_ID	JOB_ID
PERFORMING_RESOURCE_ID	For Activity1, the value is from the PERFORMING_RESOURCE_ID column, and for Activity2 and Activity3, it is from the RESOURCE_ID column.
COST	For Activity1, the value is NULL, and for Activity2 and Activity3, the value is from the COST column.
WORKING_TIME_SPENT	For Activity1, the value is NULL, and for Activity2 and Activity3, the value is from the WORKING_TIME_SPENT_IN_SECONDS column.

Activity1 Record	Source Column in LIVE_ACTIVITY table
ta_embedded_process_count	EMBEDDED_PROCESS_COUNT
ta_node_id	NODE_ID
LIVE	For Activity1, the value is 1, and for Activity2 and Activity3, the value is 0.
PROCESS_ID_2	PROCESS_ID
DesignTimeType	DESIGN_TIME_TYPE
ServerId	• For Activity1 and Activity3, the value is from [SERVER_DATA]. SERVER_ID. • For Activity2, the value is NULL.
MACHINE_NAMES	For Activity1 and Activity3, the value is from [MACHINE_NAMES]. MACHINE_NAME, and for Activity2, the value is from MACHINE_NAME.

The Activity2 and Activity3 records retrieve similar information from their respective tables, as listed above.

The Activity record stores the following fields.

Activity Record	Source Column in Activity1 table
EMBEDDED_PROCESS_COUNT	EMBEDDED_PROCESS_COUNT
NODE_ID	NODE_ID
ACTIVITY_STATUS	ACTIVITY_STATUS
AUTOMATIC	AUTOMATIC
DUE_DATE	DUE_DATE
COMPLETED_DATE	Calculated from To Date
EXPECTED_COST	EXPECTED_COST
EXPECTED_DURATION_IN_ SECONDS	EXPECTED_DURATION_IN_ SECONDS
NODE_NAME	NODE_NAME
PRIORITY	• For Activity1, it is from PRIORITY. • For Activity2 and Activity3, it is 1.
PROCESS_NAME	PROCESS_NAME
SLA_STATUS	SLA_STATUS
TYPE	TYPE

Activity1 Record	Source Column in LIVE_ACTIVITY table
VERSION	VERSION
PENDING_TIME	PENDING_TIME

Activity1 Record	Source Column in LIVE_ACTIVITY table
PENDING_TIME_IN_SECONDS	PENDING_TIME_IN_SECONDS
TAKEN_TIME	TAKEN_TIME
PROCESS_ID	PROCESS_ID
JOB_ID	JOB_ID
PERFORMING_RESOURCE_ID	PERFORMING_RESOURCE_ID
COST	COST
WORKING_TIME_SPENT	WORKING_TIME_SPENT
ta_embedded_process_count	ta_embedded_process_count
ta_node_id	ta_node_id
LIVE	LIVE
PROCESS_ID_2	PROCESS_ID_2
DesignTimeType	DesignTimeType
ServerId	ServerId
MACHINE_NAMES	MACHINE_NAMES
IsCapture	• 0 if [Design Activity Type Capture].[__ItemId] IS NULL. • 1 for all other cases.
AUTOMATIC	AUTOMATIC

Job record

The Job record is a combination of the following records:

- Job1 - Source table = JOB; Source Database = TotalAgility
- Job2 - Source table = FINISHED_JOB; Source Database = TotalAgilityFinished

The Job 1 and Job 2 records are temporary utility tables and should not be used as data sources for any custom records/metrics, because their contents are completely refreshed with every hourly data load.

The Job record is populated with Jobs where the Job's latest corresponding Business Process version has ARCHIVE_TO_PI = true.

The Job1 record stores the following fields.

Job1 Record	Source Column
COST_OVERRUN	COST_OVERRUN
CREATION_TIME	CREATION_TIME
DURATION_OVERRUN	DURATION_OVERRUN

<table>
<tr><th>Job1 Record</th><th>Source Column</th></tr>
<tr><td>EXPECTED_COST</td><td>EXPECTED_COST</td></tr>
<tr><td>EXPECTED_DURATION_IN_SECONDS</td><td>EXPECTED_DURATION_IN_SECONDS</td></tr>
<tr><td>FINISH_TIME</td><td>FINISH_TIME</td></tr>
<tr><td>JOB_STATUS</td><td>JOB_STATUS</td></tr>
<tr><td>JOB_PERCENT</td><td>For Job1, the value is 0. For Job2, the value is from JOB_PERCENT.</td></tr>
<tr><td>PRIORITY</td><td>PRIORITY</td></tr>
<tr><td>SLA_STATUS</td><td><table>
<tr><td>4</td><td>If the current date time is greater than [SLA_STATUS5_DATE]</td></tr>
<tr><td>3</td><td>If the current date time is less than [SLA_STATUS5_DATE] and greater than [SLA_STATUS4_DATE]</td></tr>
<tr><td>2</td><td>If the current date time is less than [SLA_STATUS4_DATE] and equal to [SLA_STATUS3_DATE]</td></tr>
<tr><td>1</td><td>If the current date time is less than [SLA_STATUS3_DATE] and greater than or equal to [SLA_STATUS2_DATE]</td></tr>
<tr><td>0</td><td>If the current date time is less than [SLA_STATUS2_DATE]</td></tr>
<tr><td>-1</td><td>For all other cases.</td></tr>
</table></td></tr>
<tr><td>START_TIME</td><td>START_TIME</td></tr>
<tr><td>LAST_MODIFIED_DATE</td><td>LAST_MODIFIED_DATE</td></tr>
<tr><td>TYPE</td><td>TYPE</td></tr>
<tr><td>VERSION</td><td>VERSION</td></tr>
<tr><td>EXPECTED_FINISH_TIME</td><td>EXPECTED_FINISH_TIME</td></tr>
<tr><td>STATE</td><td>STATE</td></tr>
<tr><td>WORKING_DURATION_DAYS</td><td>• For Job1, it is -1.
• For Job2, it is from WORKING_DURATION_DAYS.</td></tr>
<tr><td>PROCESS_ID</td><td>PROCESS_NAME + PROCESS_ID as a string</td></tr>
<tr><td>CATEGORY_ID</td><td>CATEGORY_ID</td></tr>
<tr><td>JOB_ID</td><td>JOB_ID</td></tr>
<tr><td>SOURCE</td><td>JOB_SOURCE</td></tr>
<tr><td>Creator</td><td>CREATOR</td></tr>
<tr><td>Owner</td><td>JOB_OWNER_ID</td></tr>
<tr><td>PROCESS_ID_2</td><td>PROCESS_ID</td></tr>
<tr><td>PROCESS_NAME</td><td>PROCESS_NAME</td></tr>
</table>

Job1 Record	Source Column
ServerId	ORIGIN_SERVER_ID
WorkType	WORK_QUEUE_DEFINITION_ID
AssociatedCaseId	ASSOCIATED_CASE_ID
EXCEPTION_RAISED_BY • 0 - None, Normal job • 1 - ServerException • 2 - ProcessException • 3 - Trigger • 4 - Alert • 5 - DocumentSet	RAISED_BY

The Job2 record retrieves similar information.

The Job record stores the following fields.

Job Record	Source Column in Job1 table
COST_OVERRUN	COST_OVERRUN
CREATION_TIME	CREATION_TIME
DURATION_OVERRUN	DURATION_OVERRUN
EXPECTED_COST	EXPECTED_COST
EXPECTED_DURATION_IN_SECONDS	EXPECTED_DURATION_IN_SECONDS
FINISH_TIME	FINISH_TIME
JOB_STATUS	JOB_STATUS
JOB_PERCENT	• For Job1, the value is 0. • For Job2, the value is from JOB_PERCENT.
PRIORITY	PRIORITY
SLA_STATUS	• [MaxSLA].[SLA] if [SLA_STATUS] > [MaxSLA].[SLA]. • [SLA_STATUS] for all other cases.
START_TIME	START_TIME
LAST_MODIFIED_DATE	LAST_MODIFIED_DATE
TYPE	TYPE
VERSION	VERSION
EXPECTED_FINISH_TIME	EXPECTED_FINISH_TIME
STATE	STATE
WORKING_DURATION_DAYS	WORKING_DURATION_DAYS
PROCESS_ID	PROCESS_ID
CATEGORY_ID	CATEGORY_ID

Job Record	Source Column in Job1 table
JOB_ID	JOB_ID
SOURCE	SOURCE
Creator	Creator
Owner	Owner
PROCESS_ID_2	PROCESS_ID_2
PROCESS_NAME	PROCESS_NAME
ServerId	ServerId
WorkType	WorkType
AssociatedCaseId	AssociatedCaseId
EXCEPTION_RAISED_BY	EXCEPTION_RAISED_BY
IsCapture	[BusinessProcess].[IsCapture]
BatchId	This is batch ID
IsValidValue	false

Document record

This record retrieves information from the following tables in the Reporting database:

- doc_dim
- doc_accum_fact
- doc_sess_snaphost_fact
- datch_sess_snaphost_fact
- etl_job
- path_dim
- tfs_class_dim

The DocumentBase record stores the following fields.

DocumentBase Record	Source Column
doc_key	Doc_dim.doc_key
doc_class	Doc_dim.doc_class_key
initial_doc_class	Doc_dim.initial_doc_class_key
Changed	• 0: If Doc_dim.doc_class_key = Doc_dim.initial_doc_class_key. • 1: For all other cases.

DocumentBase Record	Source Column
review_datetime	1/1/1900 - If Doc_dim.dt_last_review_datetime is less than 1900, and Doc_dim.dt_last_review_datetime for all other cases.
Reviewed	• 1: If Doc_dim.dt_last_review_datetime is greater than Doc_dim.dt_last_class_datetime. • 0: For all other cases.
Validated	• 1: If [doc_sess_snapshot_fact].[session_type]&2 = 2. • 0: For all other cases.
Classified	The value is 1 if [doc_sess_snapshot_fact].[session_type]&4 = 4, and 0 for all other cases.
Extracted	The value is 1 if [doc_sess_snapshot_fact].[session_type]& 1 = 1, and 0 for all other cases.
PROCESSED	Doc_dim.is_exported
Id	• [Not Available]: If [doc_accum_fact].[page_num] < 0 OR ([Doc_dim].[initial_doc_class_key] < 0 AND [Doc_dim].[initial_tsf_class_key] < 0 AND [Doc_dim].[doc_class_key] < 0 AND [Doc_dim].[group_value_key] < 0 AND [Doc_dim].[tsf_class_key] < 0). • Calculated by [Doc_dim].[in_sub_folder_position], [Doc_dim].[display_name], and [doc_accum_fact].[page_num] for all other cases.
display_name	[Doc_dim].[display_name]
is_sys_classified	[Doc_dim].[is_sys_classified]
doc_id	[Doc_dim].[doc_id]
in_root_fold_pos_sys_clsf	[Doc_dim].[in_root_fold_pos_sys_clsf]
in_sub_folder_position	[Doc_dim].[in_sub_folder_position]
in_root_folder_position	[Doc_dim].[in_root_folder_position]
is_attended_session	1: If [batch_sess_snapshot_fact].[is_attended_sess] = 1 0 - For all other cases
id_no_page_num	• [Not Available] If [doc_accum_fact].[page_num] < 0 OR ([Doc_dim].[initial_doc_class_key] < 0 AND [Doc_dim].[initial_tsf_class_key] < 0 AND [Doc_dim].[doc_class_key] < 0 AND [Doc_dim].[group_value_key] < 0 AND [Doc_dim].[tsf_class_key] < 0) • Calculated by [Doc_dim].[in_root_fold_pos_sys_clsf], and [Doc_dim].[display_name] for all other cases.
Batch_key	Doc_accum_fact.Batch_key
Confident	Doc_accum_fact.is_confly_classified
time_spent_in_classification	[doc_accum_fact].[ms_in_class]
Classified_datetime	Doc_dim.dt_last_class_datetime
page_num	[doc_accum_fact].[page_num]

DocumentBase Record	Source Column
key_strok_num	[doc_accum_fact].[key_strok_num]
field_num	[doc_accum_fact].[field_num]
class_confidence_perc	[doc_accum_fact].[class_confidence_perc]
doc_sess_duration_ms	• [doc_sess_snapshot_fact].[doc_sess_duration_ms] if [batch_sess_snapshot_fact].[is_attended_sess] = 1. • 0: For all other cases.
all_doc_sess_duration_ms	[doc_sess_snapshot_fact].[doc_sess_duration_ms]
dt_last_proc_datetime	[etl_job].[etl_end_time]
ta_document_group_name	[tsf_class_dim].[ta_document_group_name]
ta_document_type_id	[tsf_class_dim].[ta_document_type_id]
path_closest_subfolder	[path_dim].[path_closest_subfolder]
full_path_wo_closest	[path_dim].[full_path_wo_closest]

The Document record stores the following fields.

Document Record	Source Column in DocumentBase table
doc_key	doc_key
doc_class	doc_class
initial_doc_class	initial_doc_class
Changed	Changed
review_datetime	review_datetime
Batch_key	Batch_key
Confident	Confident
time_spent_in_classification	time_spent_in_classification
confidence_percentage	class_confidence_perc / 100
Reviewed	Reviewed
Validated	Validated
Classified	Classified
extracted	extracted
PROCESSED	PROCESSED
dt_last_proc_datetime	dt_last_proc_datetime
ta_document_group_name	ta_document_group_name
Id	Id
path_closest_subfolder	path_closest_subfolder
display_name	display_name

Document Record	Source Column in DocumentBase table
full_path_wo_closest	full_path_wo_closest
page_num	page_num
doc_sess_duration_ms	doc_sess_duration_ms
is_sys_classified	• 0: If [Document Classified Last].[doc_key] IS NULL • 1: For all other cases.
doc_id	doc_id
in_root_fold_pos_sys_clsf	in_root_fold_pos_sys_clsf
in_sub_folder_position	in_sub_folder_position
in_root_folder_position	in_root_folder_position
key_strok_num	key_strok_num
is_attended_session	is_attended_session
field_num	field_num
all_doc_sess_duration_ms	all_doc_sess_duration_ms
id_no_page_num	id_no_page_num
field_value	[Field Fact].[field_value]
classified_datetime	[Document Classified Last].[full_date_time]
classification_group_name	• 'Not Set' if [Document Classified Last].[classification_group_name = NULL. • [Document Classified Last].[classification_group_name for all other cases.
CATEGORY_ID	[Document Classified Last].[CATEGORY_ID]
is_confly_classified	[Document Classified Last].[is_confly_classified]
Initial Class	[Document Classified Last].[curr_tsf_class]
Class	[DocumentClass].[Class]
BatchId	This is batch ID
IsValidValue	false

Field Fact record

This record retrieves information from the following tables in the Reporting database:

- field_accum_fact
- field_dim
- field_column_dim
- etl_job is missing

The Field Fact record stores the following fields.

Field Fact Record	Source Column
Confidence	• NULL: If [field_accum_fact].[field_column_key] <> - 1. • Field_accum_fact.field_confidence_perc / 100 for all other cases.
doc_key	Field_accum_fact.doc_key
field_name	• - 1 * [field_accum_fact].[field_column_key]if [field_accum_fact].[field_column_key] <> - 1 • [field_accum_fact].[field_key] for all other cases.
field_value	Field_accum_fact.field_value
original_value	Field_accum_fact.original_value
recognized_length	Field_accum_fact.chars_recognized_num
field_tbl_index	[field_accum_fact].[field_tbl_index]
Table Name	• [field_accum_fact].[field_key] if [field_accum_fact].[field_column_key] <> - 1 • 0 for all other cases.
extr_batch_sess_key	[field_accum_fact].[extr_batch_sess_key]
extr_manual_sess_key	[field_accum_fact].[extr_manual_sess_key]
field_recog_status_key	[field_accum_fact].[field_recog_status_key]
etl_end_time	Calculated by [etl_job].[etl_end_time] + (the current date time - the current UTC date time)

Resource Group record

This record retrieves information from the following tables in the TotalAgility database:

- AW_RESOURCE
- GROUP_MEMBERS

The Resource Group record stores the following fields.

Resource Group Record	Source Column
Group_01	• AW_RESOURCE.RESOURCE_ID if AW_RESOURCE.RESOURCE_TYPE==3 • GROUP_MEMBERS.GROUP_RESOURCE_ID for all other cases.
Resource	AW_RESOURCE.RESOURCE_ID
ServerId	AW_RESOURCE.SERVER_ID

Queue record

This record retrieves information from the following tables in the TotalAgility database:

- LIVE_ACTIVITY
- LIVE_ACTIVITY_RESOURCE
- JOB
- CASE_INSTANCE
- SERVER_DATA

The Queue record stores the following fields.

Queue Record	Source Column
JOB_ID	LIVE_ACTIVITY_RESOURCE.JOB_ID
PROCESS	JOB.PROCESS_ID
Category_01	JOB.CATEGORY_ID
Job Priority	JOB.[PRIORITY]
WorkType	JOB. WORK_QUEUE_DEFINITION_ID
Creation_Time	JOB.[CREATION_TIME]
Complete Date	Calculated from To Date
VERSION	JOB.[VERSION]
JOB_SLA_STATUS	• 4: If the current date time is greater than JOB.[SLA_STATUS5_DATE]. • 3: If the current date time is less than or equal to JOB.[SLA_STATUS5_DATE] and greater than JOB.[SLA_STATUS4_DATE] • 2: If the current date time is less than or equal to JOB.[SLA_STATUS4_DATE] and greater than JOB.[SLA_STATUS3_DATE] • 1: If the current date time is less than or equal to JOB.[SLA_STATUS3_DATE] and greater than JOB.[SLA_STATUS2_DATE] • 0: If the current date time is less than or equal to JOB.[SLA_STATUS2_DATE]. • -1: For all other cases.
CASE_REFERENCE	Calculated by SQL function: COALESCE(CASE_INSTANCE.[CASE_REFERENCE], CASE_INSTANCE.[CASE_REFERENCE]) JOB.JOB_OWNER_ID
STATE	JOB.[STATE]
Creator	JOB.Creator
EMBEDDED_PROCESS_COUNT 1	JOB.[EMBEDDED_PROCESS_COUNT]
JOB_STATUS	JOB.[JOB_STATUS]
JOB_SOURCE	JOB.[JOB_SOURCE]
PROCESS_ID_2	JOB.PROCESS_ID

Queue Record	Source Column
PRIORITY	JOB.[PRIORITY]
NODE_ID	LIVE_ACTIVITY_RESOURCE.NODE_ID
EMBEDDED_PROCESS_COUNT	LIVE_ACTIVITY.EMBEDDED_PROCESS_COUNT
ACTIVITY_SLA_STATUS	• 4: If the current date time is greater than LIVE_ACTIVITY.[SLA_STATUS5_DATE] • 3: If the current date time is less than or equal to LIVE_ACTIVITY.[SLA_STATUS5_DATE] and greater than LIVE_ACTIVITY.[SLA_STATUS4_DATE] • 2: If the current date time is less than or equal to LIVE_ACTIVITY.[SLA_STATUS4_DATE] and greater than LIVE_ACTIVITY.[SLA_STATUS3_DATE] • 1: If the current date time is less than or equal to LIVE_ACTIVITY.[SLA_STATUS3_DATE] and greater than LIVE_ACTIVITY.[SLA_STATUS2_DATE] • 0: If GETDATE() is less than or equal to LIVE_ACTIVITY.[SLA_STATUS2_DATE] • -1: If LIVE_ACTIVITY.[AUTOMATIC] <> 0 for all other cases
ACTIVITY_STATUS	LIVE_ACTIVITY.ACTIVITY_STATUS
PENDING_TIME	LIVE_ACTIVITY.PENDING_TIME
NODE_NAME	LIVE_ACTIVITY. NODE_NAME
DesignTimeType	LIVE_ACTIVITY.[DESIGN_TIME_TYPE]
AUTOMATIC	LIVE_ACTIVITY.[AUTOMATIC]
DUE_DATE	• JOB.[LAST_MODIFIED_DATE], if LIVE_ACTIVITY.[DUE_DATE] IS NULL. • LIVE_ACTIVITY.[DUE_DATE] for all other cases.
PENDING_TIME_IN_SECONDS	LIVE_ACTIVITY.[PENDING_TIME]
DOCUMENT_COUNT	LIVE_ACTIVITY.[DOCUMENT_COUNT]
PAGE_COUNT	LIVE_ACTIVITY.[PAGE_COUNT]
ACTIVITY_PRIORITY	LIVE_ACTIVITY.[PRIORITY]
USE_ADV_WORKFLOW_RULES	LIVE_ACTIVITY.[USE_ADV_WORKFLOW_RULES]
RESOURCE	JOB.PERFORMING_RESOURCE_ID
SLA_STATUS	• 2: If the current date time is greater than LIVE_ACTIVITY.[SLA_STATUS3_DATE]. • -1: For all other cases.
ServerId	SERVER_DATA.SERVER_ID

Session record

This record retrieves information from the following tables in the Reporting database:

- batch_sess_snapshot_fact
- etl_job
- station.dim

The Session record stores the following fields.

Session Record	Source Column
!batch_key	batch_sess_snapshot_fact.batch_key
!conf_classes_changed_num	batch_sess_snapshot_fact.conf_classes_changed_num
!corr_split_points_num	batch_sess_snapshot_fact.corr_split_points_num
!docs_compl_num	batch_sess_snapshot_fact.docs_compl_num
!docs_created_num	batch_sess_snapshot_fact.docs_created_num
!docs_deleted_num	batch_sess_snapshot_fact.docs_deleted_num
!docs_num	batch_sess_snapshot_fact.docs_num
!docs_unclassified_num	batch_sess_snapshot_fact.docs_unclassified_num
!dt_end_datetime	[batch_sess_snapshot_fact].[dt_end_datetime] + (the current date time – the current UTC date time)
!folders_created_num	batch_sess_snapshot_fact.folders_created_num
!folders_deleted_num	batch_sess_snapshot_fact.folders_deleted_num
!folders_merged_num	batch_sess_snapshot_fact.folders_merged_num
!folders_split_num	batch_sess_snapshot_fact.folders_split_num
!is_attended_sess	batch_sess_snapshot_fact.is_attended_sess = 1
!key_strok_num	batch_sess_snapshot_fact.key_strok_num
!missed_split_points_num	batch_sess_snapshot_fact.missed_split_points_num
!pages_deleted_num	batch_sess_snapshot_fact.pages_deleted_num
!pages_num	batch_sess_snapshot_fact.pages_num
!pages_replaced_num	batch_sess_snapshot_fact.pages_replaced_num
!pages_scanned_num	batch_sess_snapshot_fact.pages_scanned_num
!sess_duration_sec	batch_sess_snapshot_fact.sess_duration_sec
!session_type	batch_sess_snapshot_fact.session_type
!sugg_classes_accepted_num	batch_sess_snapshot_fact.sugg_classes_accepted_num
!sugg_classes_changed_num	batch_sess_snapshot_fact.sugg_classes_changed_num
!ta_embedded_process_count	batch_sess_snapshot_fact.ta_embedded_process_count
!ta_job_id	batch_sess_snapshot_fact.ta_job_id

Session Record	Source Column
!ta_node_id	batch_sess_snapshot_fact.ta_node_id
!user_key	batch_sess_snapshot_fact.user_key
!wrong_split_points_num	batch_sess_snapshot_fact.wrong_split_points_num
!station name	station_dim.station_name
!Etl_end_time	[etl_job].[etl_end_time] + (the current date time - the current UTC date time)
!batch_sess_snapshot_key	[batch_sess_snapshot_fact].[batch_sess_snapshot_key]
mod_key	[batch_sess_snapshot_fact].[mod_key]

Chapter 5

Populate dashboard views

This chapter explains a step-by-step procedure for creating the data that can be displayed in Kofax Analytics for TotalAgility dashboard views.

Prerequisites:

1. Install Kofax TotalAgility
2. Import Capture Starter Pack
3. Install the Export Connector for Text
4. Scan documents

Install Kofax TotalAgility

Download the Kofax TotalAgility zip from the Kofax Fulfillment Site.

To install TotalAgility, follow the procedure given in the *Kofax TotalAgility installation Guide* available on the TotalAgility Documentation page. For the procedure described on importing the Capture Starter Pack in TotalAgility Designer and other instructions explained in the Workspace, Kofax TotalAgility 7.11.0 is installed and used.

Import Capture Starter Pack

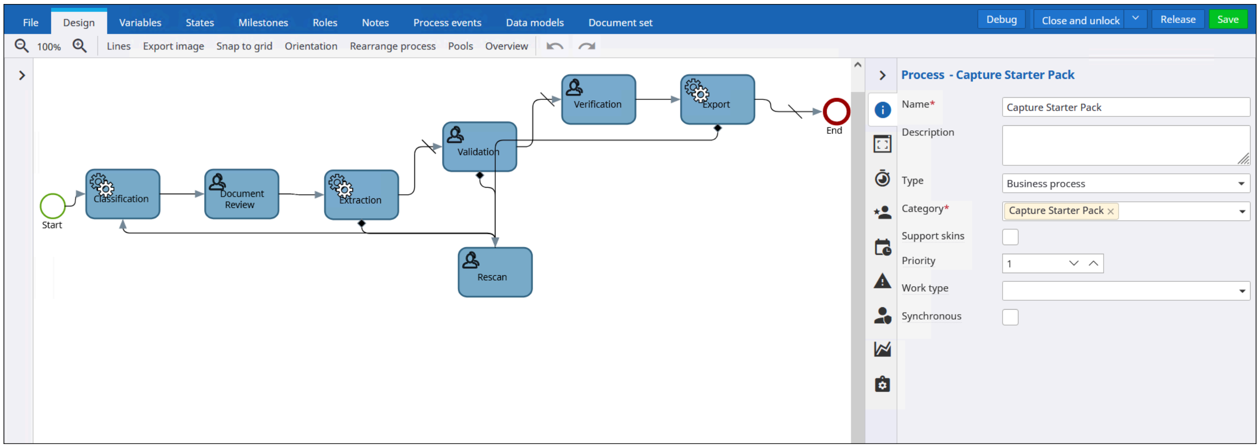
The Capture Starter Pack is a sample package with predefined components you can use to create and process jobs in TotalAgility. It is available at the following location in your TotalAgility installation files: `\\TotalAgilityInstall\Sample Processes\Capture Starter Pack`.

Import the Capture Starter Pack package into TotalAgility Designer. For information on importing and configuring the Capture Starter Pack, see the Tutorial for Capture Starter Pack.

The Capture Stater Pack process has the following activities.

- Classification
- Document Review
- Extraction
- Rescan
- Validation
- Verification

- Export



The Capture Starter Pack package includes the following forms on the Forms page in TotalAgility Designer:

- CaptureStarterPack_DocumentReview (Document review)
- CaptureStarterPack_Rescan (Scan activity)
- CaptureStarterPack_Scan (Scan create new job)
- CaptureStarterPack_Validation (Validation)
- CaptureStarterPack_Verification (Verification)
- ManualLogon (Logon)

You can access these forms by using the URL. For example, to access the CaptureStarterPack_Scan form, enter the following URL by providing your machine name or IP address:

http://<machine name or IP address>/TotalAgility/forms/CaptureStarterPack_Scan.form

Install the Export Connector for Text

Set up an export connector for the document types in a Capture Starter Pack process.

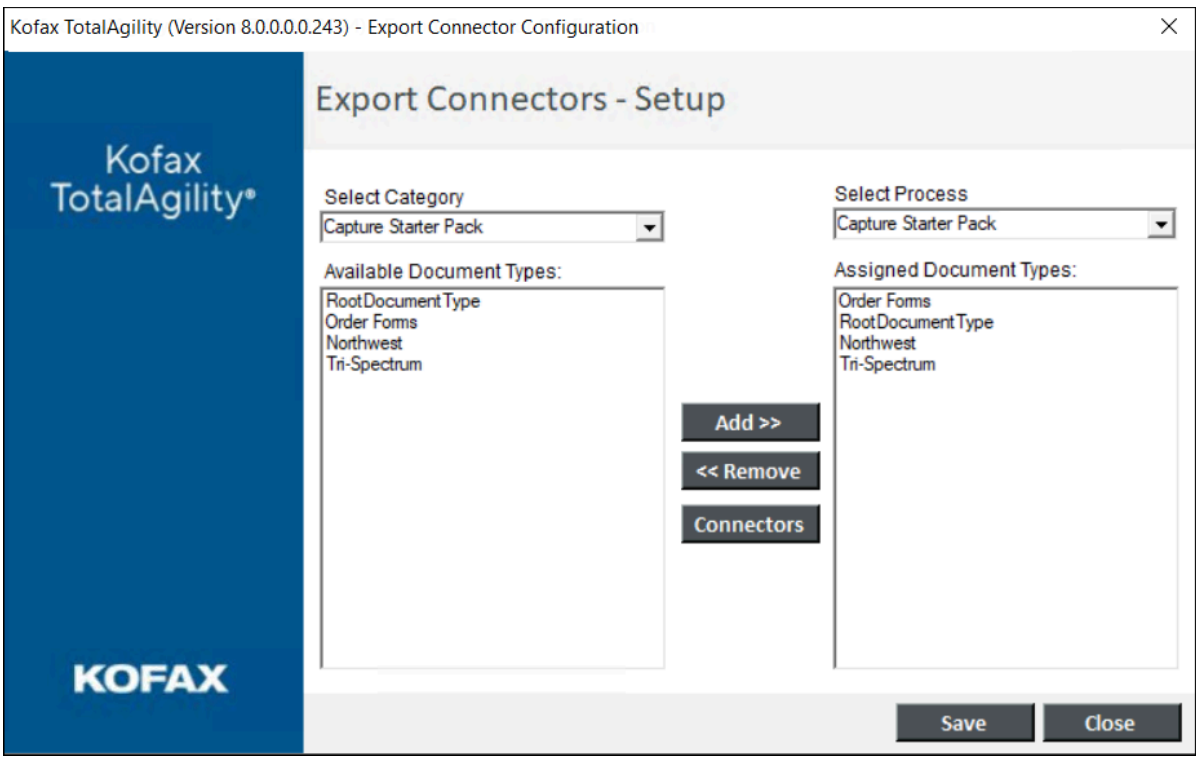
The Capture Starter Pack process in the imported Capture Starter Pack package contains an Export activity. When you use this process to create jobs, you must install the Kofax Export Connector for Text so the jobs can be completed, and information about the documents is displayed on the Kofax Analytics for TotalAgility dashboard views as most of the views require completed documents.

Download the Export Connector for Text 1.1 from the Fulfilment Site and install it to set up an export connector for a document type. See Configure the Kofax Export Connector.

Configure the Kofax Export Connector settings

Before configuring the export connector settings, create two folders, **NorthWest** and **TriSpectrum** on a local drive to save the exported documents. For example, `C:\Export\NorthWest` and `C:\Export\TriSpectrum`.

1. On the **Start** menu, select **All Programs** > **TotalAgility** > **Kofax Export Connector**.
   The **Export Connector Configuration** window appears.
2. Click **Setup**.
   The **Export Connectors - Setup** window appears.
3. On the **Select Category** list, select **Capture Starter Pack**.



4. On the **Select Process** list, select **Capture Starter Pack**.
   The list of document types from the selected process appears in the **Available Document Types** box.
5. From the **Available Document Types** box, select **Tri-Spectrum** and **NorthWest** and click **Add**.
   The selected document type appears in the **Assigned Document Types** box.
6. From the **Assigned Document Types** box, select the document type for which to assign the connector and click **Connectors**.
   The **Export Connectors - <Document type name>** window appears.
7. From the **Available Export Connectors** box, select the connectors to assign to the document type and click **Add**.

The **Kofax Export Connector for <Connector Name> Setup** window appears with a predefined user interface. The selected export connector is assigned to the document type and added to the **Assigned Export Connectors** box.

8. Enter a **Name** for the export connector.
9. Configure the other settings as needed.
10. Click **Apply** and click **OK**.

    The export connector appears under **Assigned Export Connectors**. The assigned export connectors with details such as connector name, setup version, and release version appear in the **Assigned Export Connectors** box.
11. Use ↑ and ↓ to change the sequence of connectors in the **Assigned Export Connectors** box. The export connectors are executed in the sequence specified.
12. To edit the setup properties for an Export Connector, select the Export Connector in the **Assigned Export Connectors** list and click **Update**.

    The **Kofax Export Connector for <Connector Name> Setup** window appears with a predefined user interface.
13. Map the document index fields to document fields and Kofax Capture Values to the system fields of the document.
14. Configure other details, as needed.

    If you use an Export activity in your process, at runtime, documents are converted into images and exported to a folder in the format specified.
15. Click **Save**.

    The **Export Connectors - Setup** window appears.
16. Click **Save**.

    A message appears stating that the connector mappings are saved successfully.

Scan documents

You can scan documents in two ways:

- Using the CaptureStarterPack_Scan form
- Using the MFP Emulator

Using the CaptureStarterPack_Scan form

To access the CaptureStarterPack_Scan form, enter the following URL by providing your machine name or IP address:

```
http://<machine name or IP address>/TotalAgility/forms/
CaptureStarterPack_Scan.form
```

Using the MFP Emulator

To use the MFP Emulator for scanning documents, you must configure this ingestion source for scanning. To use the Scan function of the MFP Emulator, you must create a Device scan form in TotalAgility Designer.

Download and connect the MFP Emulator to the TotalAgility machine

1. On the TotalAgility main menu, navigate to **System > System settings**, and on the **Capture** card, click **Devices**.
   The **Devices page** appears.
2. Select **MFP Emulator** to download.
3. Extract and run the MFP Emulator as an administrator.
4. Connect the MFP Emulator to the TotalAgility machine.
5. Log on with your user account.
   For more information, see the TotalAgility Designer Help.

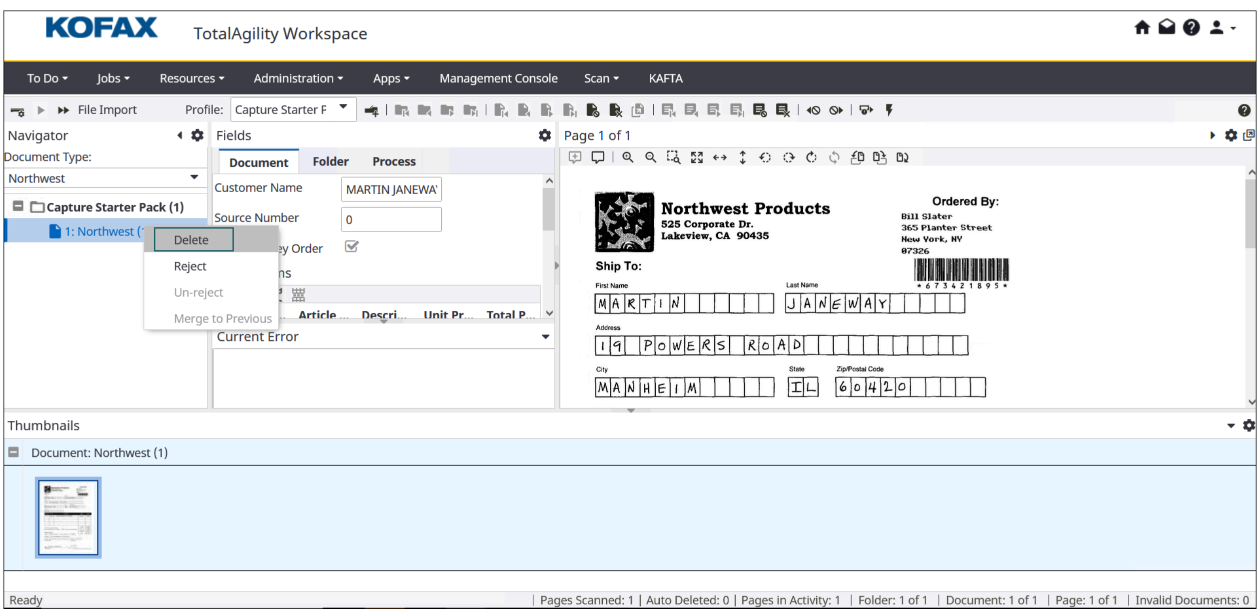
Create a Device Scan form

To use the Scan function of the MFP Emulator, do the following in the TotalAgility Designer:

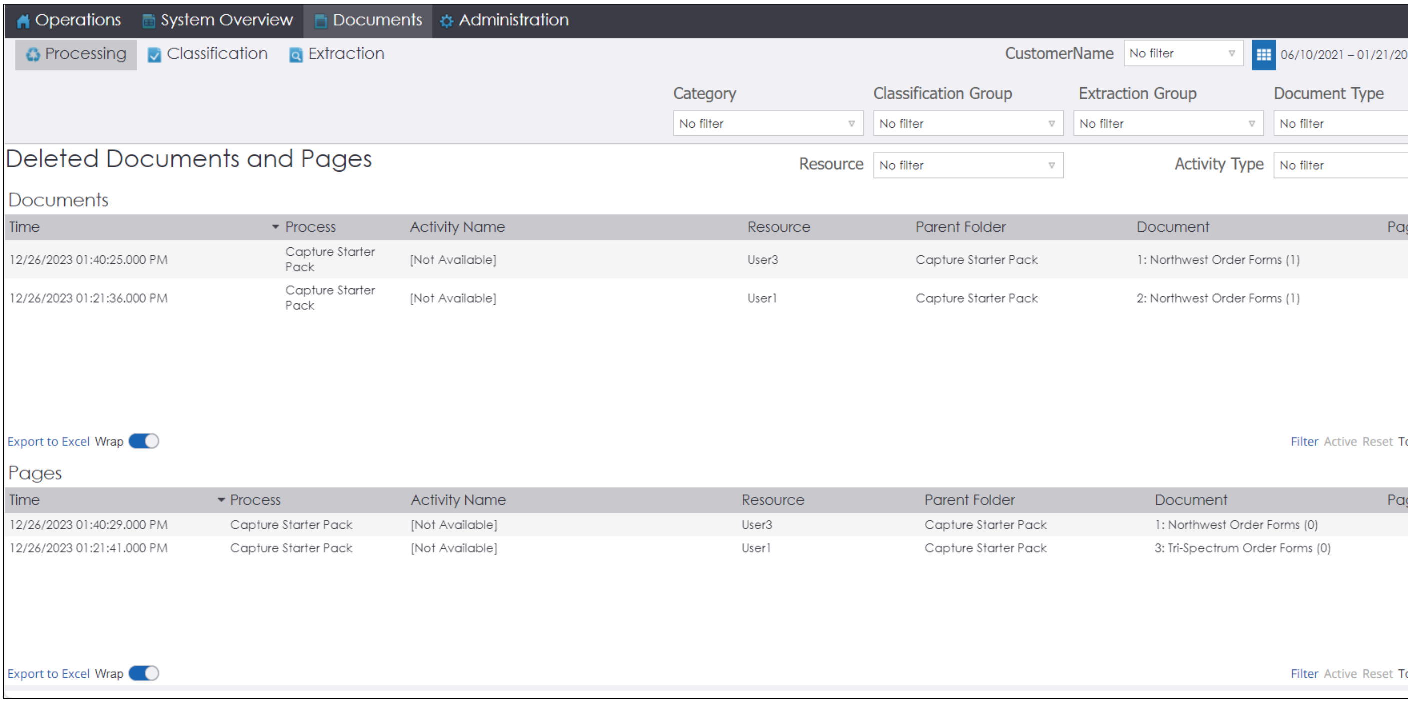
1. Generate a **Device create new job** form using the Capture Starter Pack process, Capture Starter Pack_DeviceScan form, and Capture Starter Pack category.
2. Associate this form to the **Device** Profile (**System** > **Additional settings** > **Capture** > **Devices** > **Device Profiles**)
3. Save the changes.

Deleted Documents and Pages

To delete a document and pages, navigate to TotalAgility Workspace and delete a document.



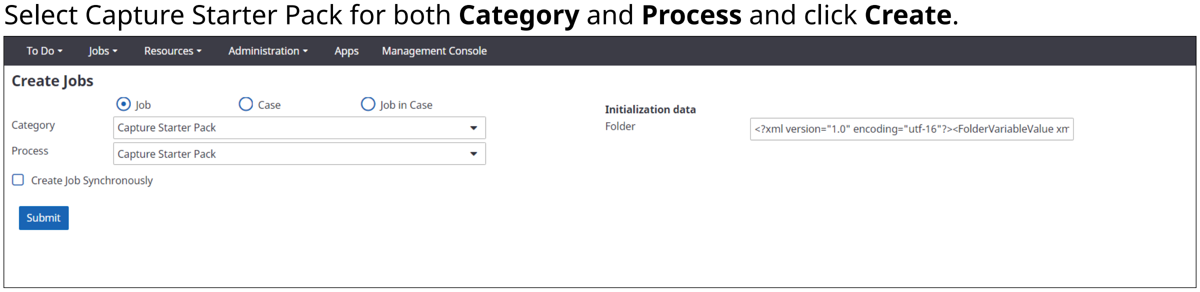
In Kofax Analytics for TotalAgility, navigate to **Documents > Deleted Documents and Pages** to view all documents and pages deleted from the system so there is visibility into documents and pages that are being deleted by resources in TotalAgility. You can also view details about deleted documents and pages.



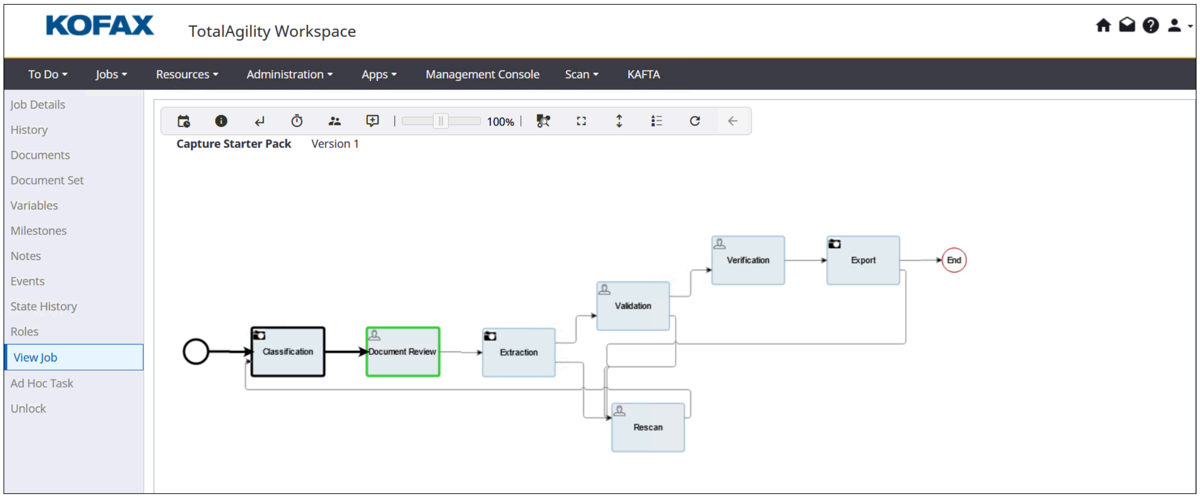
Access TotalAgility Workspace to create and monitor jobs

To create a job on the Capture Starter Pack process, do the following.

1. Log onto TotalAgility Workspace.
2. On the Jobs menu, click **Create**.
3. Select Capture Starter Pack for both **Category** and **Process** and click **Create**.



A job goes through the following activities: **Scan > Classification > Document Review > Extraction > Validation > Verification > Export.**



Once a job is created in TotalAgility Workspace, you can view the corresponding data on the Kofax Analytics for TotalAgility dashboard views.

Get data on the dashboard views

To populate the data on the dashboard views, do the following:

1. Log in to TotalAgility Workspace.
2. Create a job on the Capture Starter Pack process and process the job from Scan activity to Export activity. On creating a job, the job is ready at the Document Review node in the job viewer.
3. Log in to Insight Admin Console and execute the Hourly Execution Plan successfully to synchronize the data from TotalAgility databases to Kofax Analytics for TotalAgility database. For information on running the Hourly Plan, see the *Kofax Analytics for TotalAgility Administrator's Guide*.

> On completing the job, you may need to wait for a few minutes for the reporting data to complete the process before running the Hourly Plan.

The data that is displayed on the Kofax Analytics for TotalAgility dashboards corresponds to the TotalAgility Workspace forms. For example, the list of activities that is displayed on the **GeneralWorkqueue (AllActivities)** TotalAgility Workspace form is also displayed on the Overview view of the Operations dashboard of Kofax Analytics for TotalAgility.

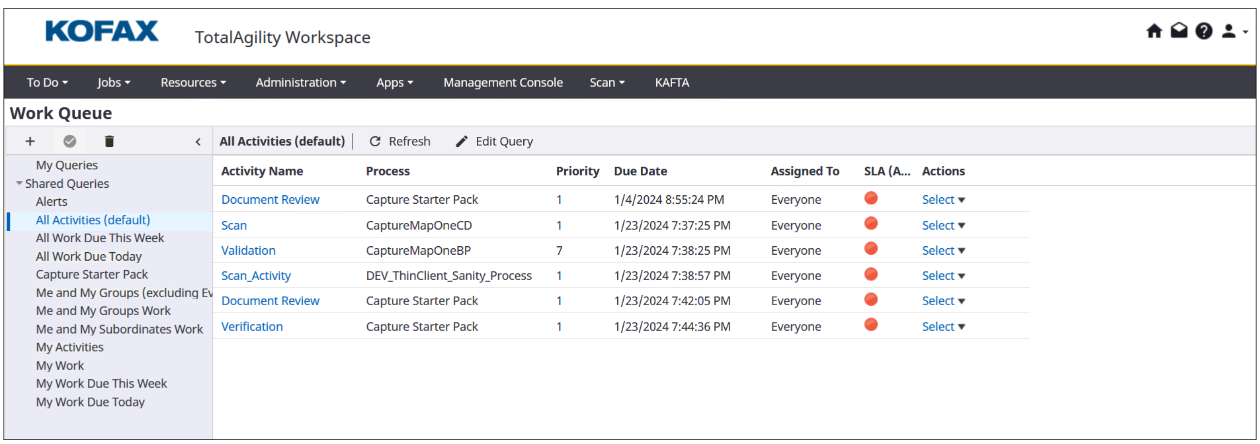
For the data to be populated on the other dashboard views, such as System Overview and Documents, you must complete the job successfully by processing through all the activities in the Capture Starter Pack. See the following Jobs view, and Deleted Documents and Pages view to see how the data is displayed on the views on completing a job in TotalAgility Workspace and running the Hourly Execution Plan in the Insight Admin Console:

- Use the **Findjobs (Completed Jobs)** TotalAgility Workspace form to view the list of completed jobs. The same information is displayed on the **Operations > Jobs** view in Kofax Analytics for TotalAgility.
- In TotalAgility Workspace, delete a document, for example, Northwest Order Forms. The same list of deleted documents and pages is displayed on the **Documents > Processing > Deleted Documents and Pages** view in Kofax Analytics for TotalAgility.

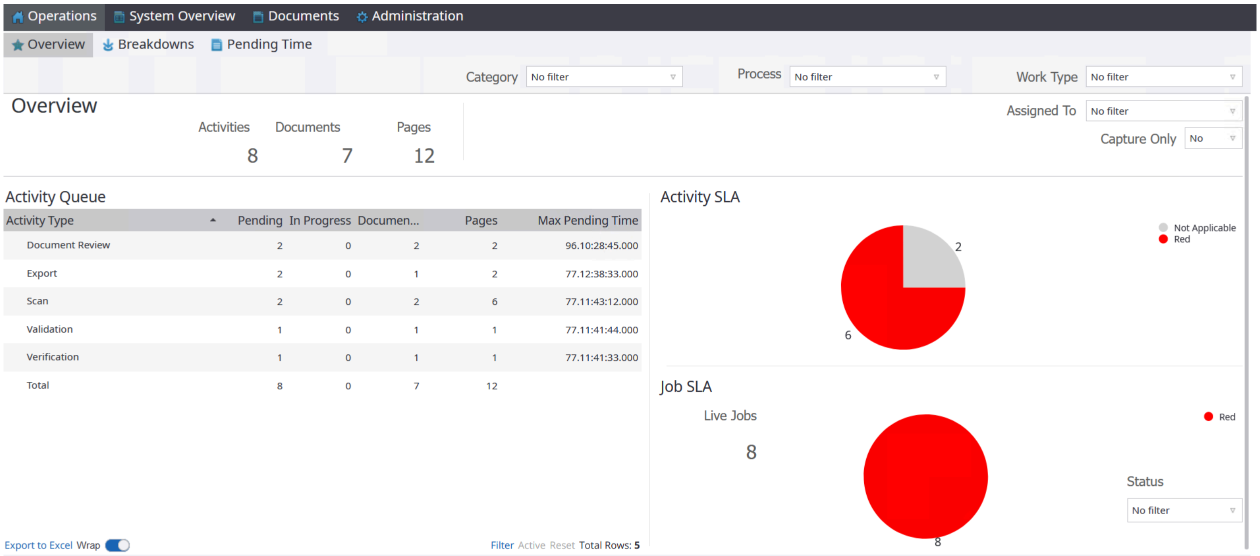
You can configure the data to display on the graphical charts by "Source" and by "Masked field values."

Overview

In TotalAgility, you can view the work queue on the **GeneralWorkqueue (AllActivities)** TotalAgility Workspace form.



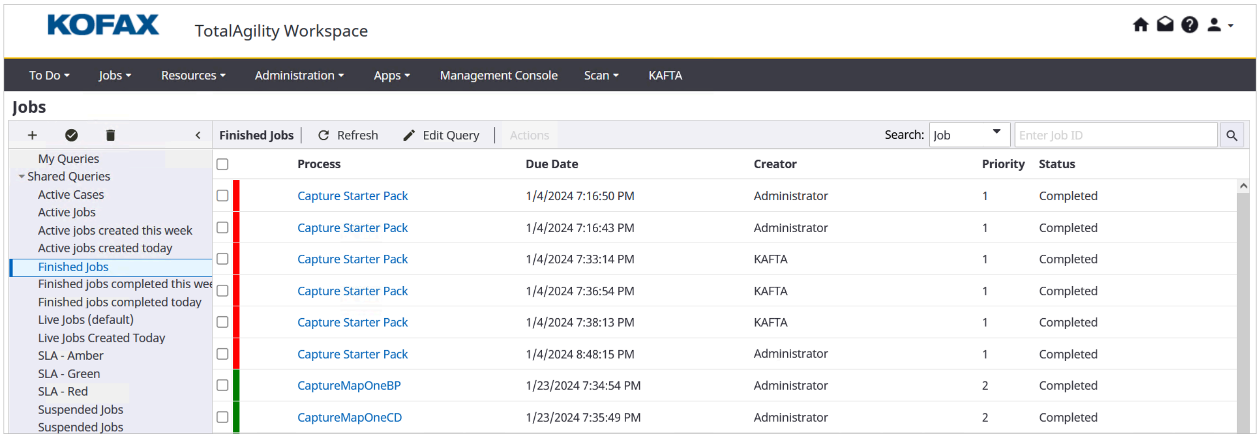
In Kofax Analytics for TotalAgility, you can view all the pending activities of the Capture Starter Pack process in **Operations > Overview > Activity Queue**. The Activity Queue is a textual chart that displays the information for each activity type, including the count of live activities that are pending and in progress, the count of documents and pages that are pending, and the time for the activity that has been pending the longest.



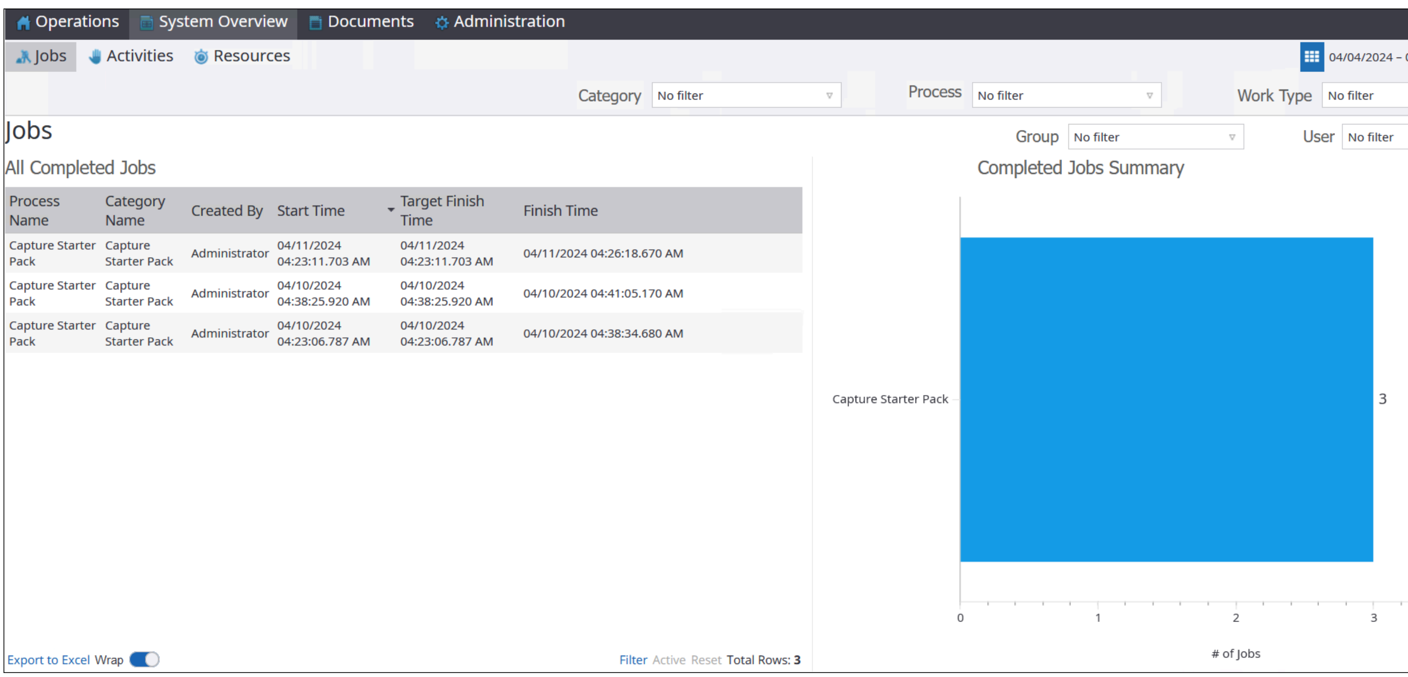
Activity Name	Description	Pending activities count
Document Review	Review a document after classification.	2
Export	Export the documents after verification.	2
Scan	Scan the documents.	6
Validation	Validate field values after extraction.	1
Verification	Verify a document after validation.	1
		Total: 12

Jobs

View the completed jobs in TotalAgility on the **Findjobs (Completed Jobs)** TotalAgility Workspace form.



View all the completed jobs in Kofax Analytics for TotalAgility on the **System Overview > Jobs** view.



Display data on the dashboard views by source

This section describes how to populate the data on the Breakdowns dashboard in a graphical chart by Source dimension. Each chart on this view displays the breakdown of jobs split by corresponding dimensions: Source, Priority, Status, and Process.

To view the data on the Kofax Analytics for TotalAgility dashboards by source, add a .Net Activity in your Capture Starter Pack business process in TotalAgility Designer.

1. Open the Capture Starter Pack business process.

2. Create a new variable, **JOBID**, and set the **Type** as **System** and **Value** as **AWF_JOBID**.
3. Add a .Net Activity, **Update JobSource**, between the Classification and Document review activities.
4. Configure the .Net activity as follows:
    a. On the **Assembly file path** list, select TotalAgility.Sdk.dll
    b. on the **Class** list, select TotalAgility.Sdk.JobService.
    c. On the **Method** list, select UpdateJobSource.
    d. Map the parameters to values using the following process and server variables.

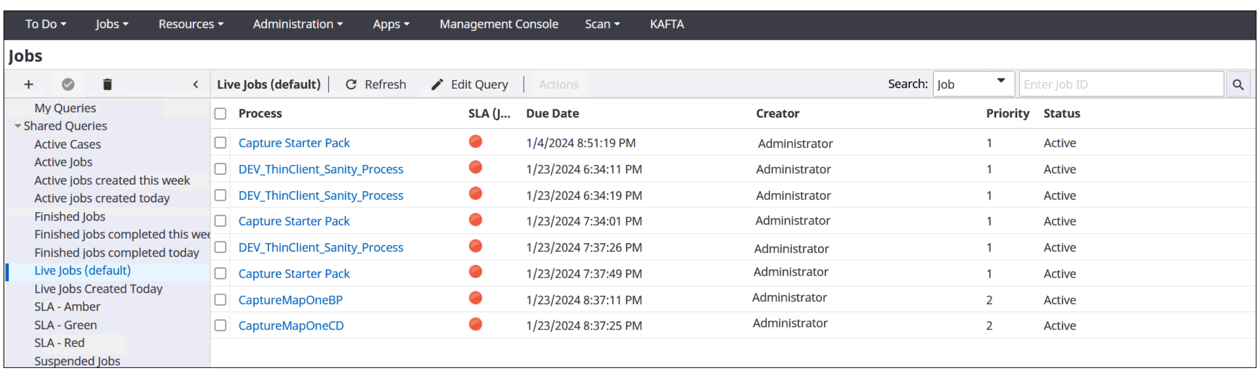
sessionId	SPP_SYSTEM_SESSION_ID (server variable)
jobId	JOBID (previously created process variable)
JobSource	Folder.Name (or any name, such as Asia)

    e. Save the configuration.
5. Release the process map.
6. In TotalAgility Workspace, create a new job.
7. In the Insight Admin Console, run the Hourly Execution Plan successfully to view the data on the Kofax Analytics for TotalAgility dashboard views, such as the Breakdowns view.

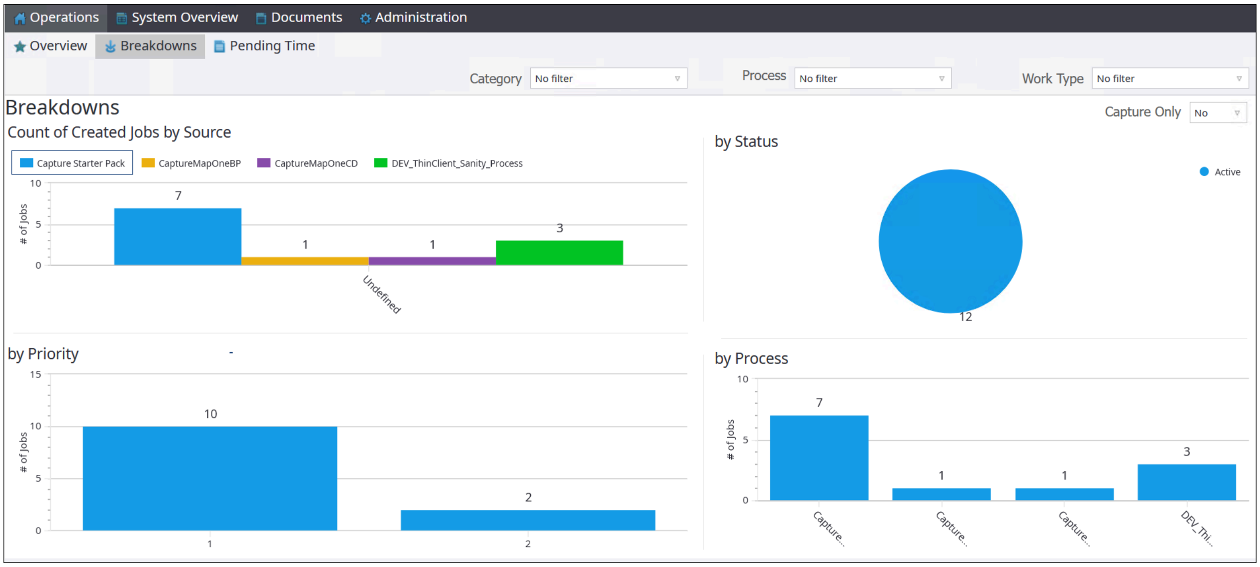
Breakdowns

The Breakdowns view on the Operations dashboard is used to perform an in-depth analysis of the live data in the Overview based on a range of criteria. You can view the breakdowns of jobs, documents, and pages based on the live data. Consider the example to view the breakdown of live jobs by source.

In TotalAgility, view the live jobs that are active on the **Findjobs (Live Jobs)** TotalAgility Workspace form.



In Kofax Analytics for TotalAgility, view all the live jobs of the Capture Starter Pack process in the **Operations > Breakdown** dashboard.



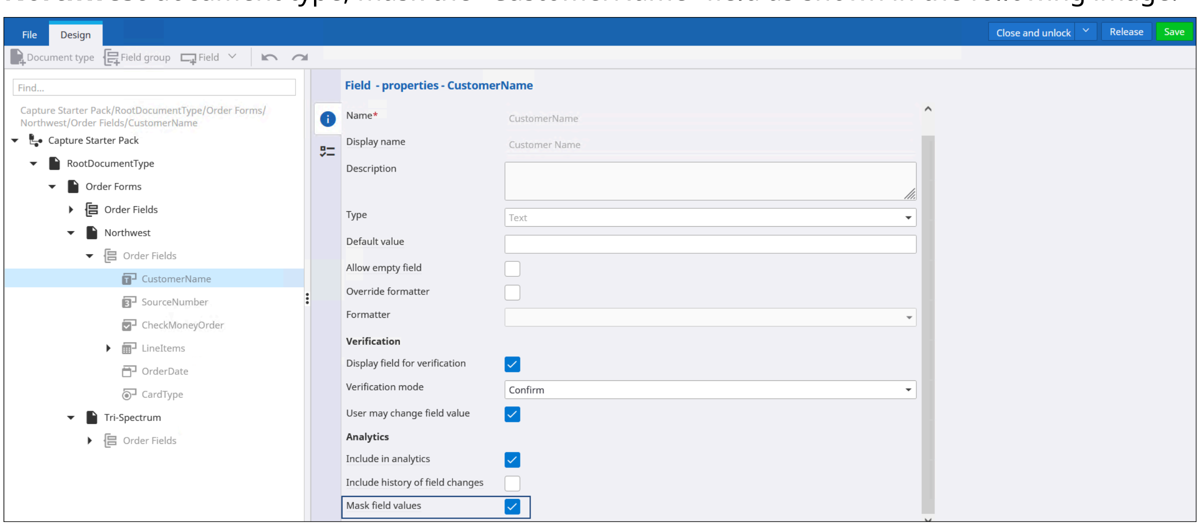
Display data on the dashboard views by masked field values

This section describes how to populate the data on the Document Search view by masking the document field values.

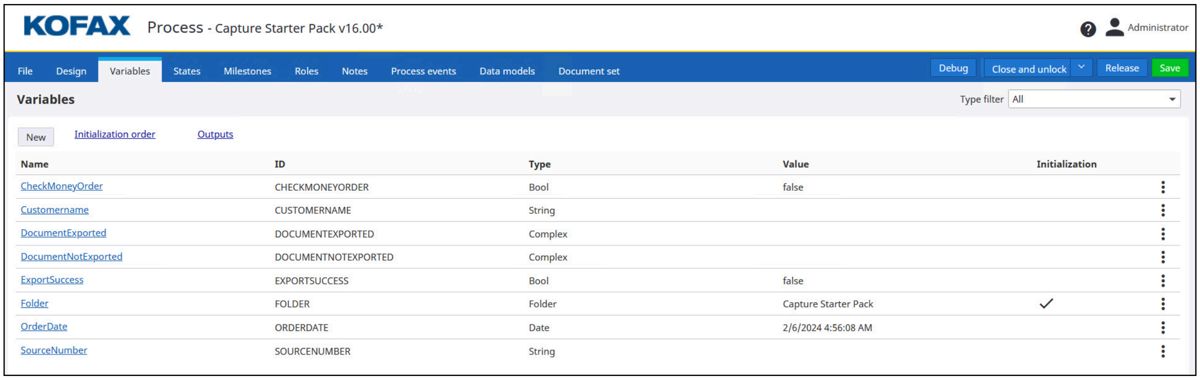
The field values that are masked in TotalAgility are hidden in the Kofax Analytics for TotalAgilityDocuments views.

See the following Document Search view with masked field values.

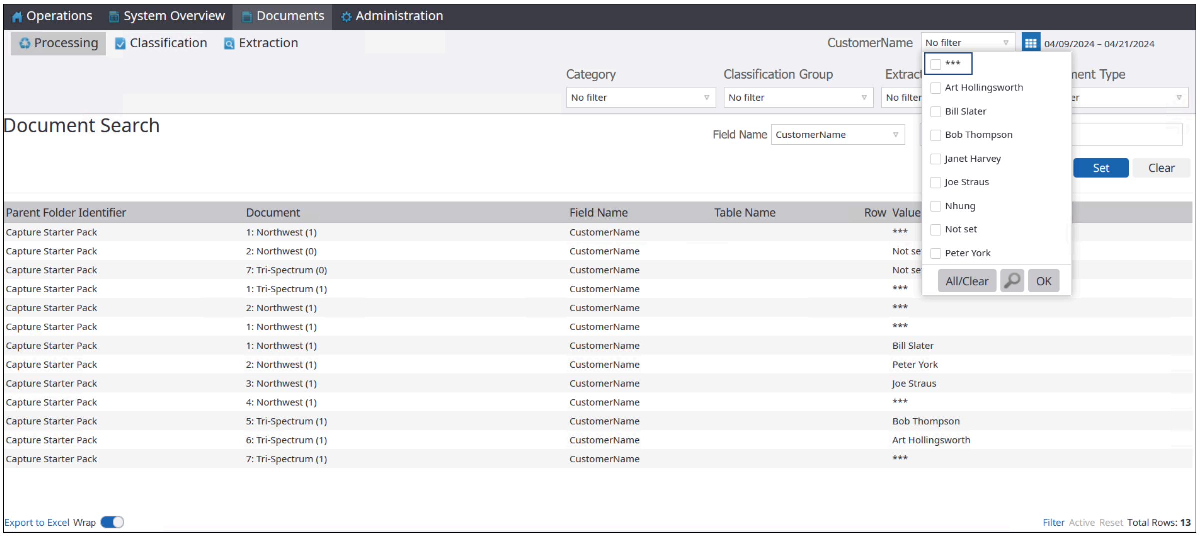
1. In the TotalAgility Designer, open the Capture Starter Pack extraction group.
2. Select the "Mask field values" check box for the document fields to mask. For example, in the **Northwest** document type, mask the "CustomerName" field as shown in the following image.



3. To display the field name list in the Document Trending view, add variables in the Capture Starter Pack business process and configure the field names in the extraction group in the TotalAgility Designer. The names of the variables should be the same as document field names as shown in the following image.



4. To display the masked filed values in Kofax Analytics for TotalAgility, do the following on the Administration view.
   a. On the **Retention Policy** view, set the retention policy for the fields and click **Save**.
   b. On the **Filter Field**view, on the **Select Field** list, select the document field, such as CustomerName. The **Select Field** list displays the document fields configured in the extraction group in TotalAgility Designer.
   c. Click **Save Field**.
      This will run the Document Field Filter Setup plan to populate the possible values and may take some time to run. Once the plan runs, the filter on Capture views is only updated if you refresh the browser. The documents can only be filtered on the field that was set at the time the Hourly Plan loaded the document. The saved filter field name with masked appears on all the Capture views.
   d. Save each field for which you have masked the field values.
5. From the Insight Admin Console, run the Hourly Execution Plan.
6. In TotalAgility Workspace, create a job and complete the job.
7. In Kofax Analytics for TotalAgility, view the data on the **Documents > Processing > Documents Search** view.
   The masked field's value appears as "***" on all views of the Documents dashboard. In the **Northwest** document type, the "CustomerName" field that was masked in the TotalAgility Designer is displayed on the Document Search dashboard view as "***" as shown in the following image.


Operations
System Overview
Documents
Administration
Processing
Classification
Extraction
CustomerName
No filter
04/09/2024 – 04/21/2024
Category
No filter
Classification Group
No filter
***
Art Hollingsworth
Bill Slater
Bob Thompson
Janet Harvey
Joe Straus
Nhung
Not set
Peter York
All/Clear
OK
Document Search
Field Name
CustomerName
Set
Clear
Parent Folder Identifier
Document
Field Name
Table Name
Row
Value
Capture Starter Pack
1: Northwest (1)
2: Northwest (0)
7: Tri-Spectrum (0)
1: Tri-Spectrum (1)
2: Northwest (1)
3: Northwest (1)
4: Northwest (1)
5: Tri-Spectrum (1)
6: Tri-Spectrum (1)
7: Tri-Spectrum (1)
CustomerName
Bill Slater
Peter York
Joe Straus
Bob Thompson
Art Hollingsworth
Export to Excel
Wrap
Filter
Active
Reset
Total Rows: 13