Kofax Analytics for MarkView

Administrator's Guide

Version: 1.2.0

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Table of Contents

Preface

This guide includes instructions for installing, upgrading, configuring, administering, and using Kofax Analytics for MarkView.

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

Related documentation

The documentation set for Kofax Analytics for MarkView is available online:[1]

http://docshield.kofax.com/Portal/Products/KAMV/1.2.0-j2pn517leq/KAMV.htm

In addition to this guide, the documentation set includes the following items:

Kofax Analytics for MarkView Product Features Guide

Provides information about the features included and options available with Kofax Analytics for MarkView. Use this guide to decide which product features are important to the business challenges you face and best suit your site.

Help for Kofax Analytics for MarkView

Describes how to use Kofax Analytics for MarkView predefined views.

Kofax Analytics for MarkView Release Notes

Contains late-breaking product information that may not be included in other Kofax Analytics for MarkView documentation. You can download the release notes from the Kofax website at www.kofax.com.

Offline documentation

To make the documentation available for use in offline mode, obtain the documentation files from the Kofax Analytics for MarkView product package that you downloaded from the Kofax Fulfillment Site. The product package includes the KofaxAnalyticsForMarkViewDocumentation_1.2.0_EN.zip , which contains the entire documentation set in English.

The .zip file includes both help and print folders. The print directory contains all Kofax Analytics for MarkView guides that can be saved at any convenient location.

[1] You must be connected to the Internet to access the full documentation set online. If the security policy for your organization requires offline access (without an Internet connection), see Access the Kofax Analytics for MarkView help.

Access the Kofax Analytics for MarkView help

To launch the online help for the installed version of the product, click the Help icon within the application.

To access the Kofax Analytics for MarkView help in offline mode, perform the following steps:

1. Download KofaxAnalyticsForMarkViewDocumentation_1.2.0_EN.zip from the Kofax Fulfillment Site.
2. Extract the contents of the documentation .zip file to the Insight folder at `<...>\Program Files\Kofax\Insight 6.4.0`
3. Log in to the Kofax Analytics for MarkView viewer as Administrator and navigate to **Administration** > **Parameters** to configure view parameters. Enable **Use Help Offline** and click **Save**.
4. Start Kofax Analytics for MarkView or reload all open pages, and click the Help icon to open the help in a separate browser window.

Getting help with Kofax products

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

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

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

The Kofax Knowledge Base provides:

- Powerful search capabilities to help you quickly locate the information you need.

  Type your search terms or phrase into the **Search** box, and then click the search icon.
- Product information, configuration details and documentation, including release news.

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

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

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

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

Chapter 1

Introduction

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

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

Kofax Analytics for MarkView brings together data from the Oracle E-Business Suite system, MarkView, and Kofax Capture with Kofax Transformation Modules workflows to give you strategic information about your business activities. Kofax Analytics for MarkView provides the insight and metrics required to analyze the effectiveness of business processes.

With Kofax Analytics for MarkView you can:

- Prioritize daily activities
- Take advantage of available discounts
- Check for duplicate invoices and possible compliance violations
- Review invoice summary data
- Take action to meet key performance indicators
- Review invoice full history and status
- Optimize cash resources

Chapter 2

System requirements

Most software requirements for Kofax Analytics for MarkView, including the supported versions of Kofax MarkView and Insight, are listed in the *Technical Specifications* document on the Kofax website at www.kofax.com.

Review it carefully before installing your product, and verify that you have applied the most current service packs or fix packs listed in the document. Also, be sure to read the service pack or fix pack documentation (release notes or ReadMe file), as applicable.

Kofax MarkView fix packs

Verify that your system meets the minimum system requirements.

Verify that you have completed all the applicable instructions in the Kofax MarkView ReadMe files for versions that are listed in the *Technical Specifications* document.

Follow the instructions in the ReadMe files for the KTM Project to manually update your customized XSLT files.

Insight server

The Kofax Insight software runs on a 64-bit based server with a minimum 2.7 GHz quad core clock speed, with 16 GB RAM.

We recommend that you install Insight on a server that differs from your database or other servers. If the Insight server is installed on the same server as your database server or other Kofax servers, it may impact production throughput. The resource requirements for the Insight server must be considered along with the requirements defined by the database vendor for Insight-related operations.

Database servers

Kofax Analytics for MarkView supports the Oracle database only.

The Data database is typically hosted on a high-performing server, with each core at 2.7 GHz.

If the Insight schemas are installed in a separate dedicated database instance, be sure to consider the following RAM requirements.

- 8 GB RAM: For databases with up to 1 million invoices
- 16 GB RAM: For databases with 1 to 5 million invoices

- 24 GB RAM: For databases that exceed 5 million invoices

Chapter 3

Install Kofax Analytics for MarkView

This chapter assumes that you have already installed the following Kofax products:

- Kofax Insight
- Kofax MarkView for Oracle EBS with the required fix pack that includes support for the version of Kofax Analytics for MarkView that you plan to install

If you intend to perform a new Kofax Analytics for MarkView installation, complete the procedure outlined in this chapter.

If you have Kofax Analytics for MarkView installed, skip this chapter and proceed to Upgrade Kofax Analytics for MarkView.

You can use Kofax Analytics for MarkView following the SSL protocol. To configure SSL in Kofax Analytics for MarkView perform the following steps:

- Configure MarkView using MarkView Installation or Upgrade Guide, if required.
- Configure Insight using Insight Installation or Upgrade Guide, if required.
- Configure operating system, if required.

Create schema for Kofax Analytics for MarkView

Follow the instructions to create a new schema, user, and schema objects for Kofax Analytics for MarkView.

> **Note** Create a schema for Kofax Analytics for MarkView on the same database as Oracle EBS and MarkView.

1. Log in to the database as SYSDBA.
2. Navigate to `<distribution_directory>\Analytics_DB\KAMV_DB`, where `<distribution_directory>` is the location where you downloaded and extracted the installation package.
3. Run kamv_create_tablespace.sql to create the data tablespace for Kofax Analytics for MarkView.
   When prompted, enter the size and data file location.
4. Run kamv_create_tablespace.sql to create the index tablespace for Kofax Analytics for MarkView.
   When prompted, enter the size and data file location.

5. Run kamv_create_account.sql and create a new schema user using the tablespace created earlier.

   When prompted, enter the schema username and password and temporary tablespace for tables and indexes.

   > **Note** If you change the password, verify that you also change the schema password in the Insight **Admin Console** > **Projects** > **KAMV** > **KAMV**, **Admin Console** > **Connections** > **KAMV**, and if applicable, in the Kofax Capture Administration module for the Workflow Agent. For more information, see Configure the connection string.

6. To assign privileges to a new schema user, run kamv_grant_privileges.sql.
7. Log in to the database as APPS.
8. To assign privileges to a new schema user, run kamv_grant_privileges_apps.sql.
9. Log in to the database as SYSDBA.
10. For Oracle EBS version 12.2 and higher, you must also run kamv_alter_user_ora12_2_only.sql to enable editions.
11. To create the Access Control List file for accessing HTTP services from the database, run kamv_create_acl.sql and create a new ACL for the schema user created earlier.

    When prompted, enter the schema username and the MarkView host name.

Create schemas for Kofax Analytics for MarkView Insight project

Follow the instructions to create new schemas and schema objects for Kofax Analytics for MarkView Insight project.

1. Log in to the database as SYSDBA.
2. Navigate to <distribution_directory>\Analytics_DB\BI_DB\ where <distribution_directory> is the location where you downloaded and extracted the installation package.
3. Create KAMV_META and KAMV_DATA schemas using the `create_account.sql` script.

   It will create schemas with minimum database privileges for the Analytics project:

   - CREATE SESSION
   - CREATE TABLE
   - CREATE PROCEDURE
   - CREATE SEQUENCE
4. For KAMV Data schema user (KAMV_DATA), assign privileges using the `kamv_grant_privileges.sql` script.
5. For Oracle EBS version 12.2 and higher, you must also run the `alter_user_ora12_2_only.sql` script to enable editions for the KAMV_DATA schema user.

Install Oracle Database 19c Client (19.3) for Microsoft Windows (32-bit)

If you plan to integrate with Kofax Capture and Kofax Transformation Modules on Windows Server 2019, complete the following procedure.

1. Install Oracle Database 19c Client (19.x).
   a. Run the installer.
   b. Select the **Custom** installation type.
   c. On the **Available Product Components** page, select the following components.
      - Oracle ODBC Driver
      - Oracle Provider for OLE DB
      - Oracle Data Provider for .NET
   d. Install the product.
2. Register Oracle.DataAccess.dll in the GAC by running the following commands in the CMD (use 32-bit CMD):

```
cd <oracle_client>\odp.net\bin\4
```

```
OraProvCfg.exe /action:ungac /providerpath:<oracle_client>\odp.net\bin
\4\Oracle.DataAccess.dll
```

```
OraProvCfg.exe /action:ungac
/providerpath:<oracle_client>\odp.net\PublisherPolicy
\4\Policy.4.112.Oracle.DataAccess.dll
```

```
OraProvCfg.exe /action:ungac
/providerpath:<oracle_client>\odp.net\PublisherPolicy
\4\Policy.4.121.Oracle.DataAccess.dll
```

```
cd <oracle_client>\odp.net\bin\4
```

```
OraProvCfg.exe /action:gac /providerpath:<oracle_client>odp.net\bin
\4\Oracle.DataAccess.dll
```

```
OraProvCfg.exe /action:gac
/providerpath:<oracle_client>\odp.net\PublisherPolicy
\4\Policy.4.112.Oracle.DataAccess.dll
```

```
OraProvCfg.exe /action:gac
/providerpath:<oracle_client>\odp.net\PublisherPolicy
\4\Policy.4.121.Oracle.DataAccess.dll
```

```
cd <oracle_client>\odp.net\bin\2.x
```

```
OraProvCfg.exe /action:ungac /providerpath:<oracle_client>\odp.net\bin\2.x
\Oracle.DataAccess.dll
```

```
OraProvCfg.exe /action:ungac
/providerpath:<oracle_client>\odp.net\PublisherPolicy\2.x
\Policy.2.102.Oracle.DataAccess.dll
```

```
OraProvCfg.exe /action:ungac
/providerpath:<oracle_client>\odp.net\PublisherPolicy\2.x
\Policy.2.111.Oracle.DataAccess.dll
```

```
OraProvCfg.exe /action:ungac
/providerpath:<oracle_client>\odp.net\PublisherPolicy\2.x
\Policy.2.112.Oracle.DataAccess.dll
```

```
OraProvCfg.exe /action:ungac
```

```
/providerpath:<oracle_client>\odp.net\PublisherPolicy\2.x
\Policy.2.121.Oracle.DataAccess.dll
```

```
cd <oracle_client>\odp.net\bin\2.x
```

```
OraProvCfg.exe /action:gac /providerpath:<oracle_client>\odp.net\bin\2.x
\Oracle.DataAccess.dll
```

```
OraProvCfg.exe /action:gac
/providerpath:<oracle_client>\odp.net\PublisherPolicy\2.x
\Policy.2.102.Oracle.DataAccess.dll
```

```
OraProvCfg.exe /action:gac
/providerpath:<oracle_client>\odp.net\PublisherPolicy\2.x
\Policy.2.111.Oracle.DataAccess.dll
```

```
OraProvCfg.exe /action:gac
/providerpath:<oracle_client>\odp.net\PublisherPolicy\2.x
\Policy.2.112.Oracle.DataAccess.dll
```

```
OraProvCfg.exe /action:gac
/providerpath:<oracle_client>\odp.net\PublisherPolicy\2.x
\Policy.2.121.Oracle.DataAccess.dll
```

Where `<oracle_client>` is the Oracle Database 19c Client (32-bit) installation folder.

Run the Kofax Analytics for MarkView Setup Wizard

Before starting the Setup Wizard, verify that you have 32-bit or 64-bit ODAC 11, 12, or 19 installed. If 64-bit ODAC is already installed on the same system, verify that 32-bit ODAC is configured correctly, or run the Setup Wizard from a system where only 32-bit ODAC is installed.

1. Run `<distribution_directory>\Kofax Analytics for Markview.msi`, where `<distribution_directory>` is the location where you downloaded and extracted the installation package.

   The Kofax Analytics for MarkView Setup Wizard appears.
2. Click **Next** to start the installation.

   The license agreement window appears.
3. Review the license agreement, accept the terms, and click **Next**.
4. When prompted to select the installation type, select **Install/Update the Kofax Analytics for MarkView schema**.
5. Configure **Database connection properties** using one of the following methods:

   > **Note** If you want to use SSL protocol, configure database connection using the custom connection string.

   - **Enter connection settings** as shown in the table:

Host:	The database host where the Kofax Analytics for MarkView and MarkView schemas are installed.
Port:	The database port number.
SID or **Service Name**:	The system ID or the service name.
KAMV Schema Username:	The Kofax Analytics for MarkView schema user.

KAMV Schema Password:	The Kofax Analytics for MarkView schema user password.
KAMV DATA Schema Username:	The KAMV_DATA schema username.
KAMV DATA Schema Password:	The KAMV_DATA schema password.
MarkView Schema Username:	The MarkView schema user.
MarkView Schema Password:	The MarkView schema user password.
KAMV Tablespace:	The tablespace created for tables and data.
KAMV Indexspace:	The tablespace created for indexes.

- **Enter connection strings** as in the template below:

```
SERVER=(DESCRIPTION=(ADDRESS_LIST=(ADDRESS=(PROTOCOL=<protocol>)(HOST=<host>)
(PORT=<port>)))(CONNECT_DATA=(<SID/SERVICE_NAME>=<SID or service name
 value>)));user id=<user name>;pwd=<password>;
```

where

<protocol>	is a protocol value such as TCP or TCPS.
<host>	is a database host name.
<port>	is a database port.
<SID/SERVICE_NAME> parameter	Use the SERVICE_NAME parameter to identify the Oracle9i or Oracle8 database service to access.
	Use the SID parameter to identify the Oracle8 database instance by its Oracle System Identifier (SID). If the database is Oracle9i or Oracle8, use the SERVICE_NAME parameter rather than the SID parameter.
<SID or service name value>	is a value of the SID or SERVICE_NAME parameter
<user name>	is a Kofax Analytics for MarkView schema username
	is a KAMV_DATA schema username
	is a MarkView schema username
<password>	is a Kofax Analytics for MarkView password
	is a KAMV_DATA password

	is a MarkView password

6. Click **Test connection** to verify that the connection data is valid.
7. The installer identifies the Kofax Analytics for MarkView database and Oracle EBS version and starts the corresponding SQL scripts.
8. When the installation is complete, click **Finish** to close the wizard.

Configure the Kofax Analytics for MarkView Insight project

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

You can also install the Insight license. See the *Kofax Insight Administrator's Guide* for licensing information.

Use this procedure to import a project that contains built-in views, records, and metrics for Kofax Analytics for MarkView.

1. Copy and replace all the contents of the <distribution_directory>\Analytics_BI\Resources directory to the Insight installation directory, such as:
   C:\Program Files\Kofax\Insight 6.4
   where <distribution_directory> is the location where you downloaded and extracted the installation package
2. From the Windows Start menu, run **Setup Analytics Project** and enter the login credentials for the Administrator.
   The default administrator login credentials are:
   - Login name: Administrator
   - Password: The password you entered during the Kofax Insight installation.

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

3. To add the built-in views, records, and metrics for Kofax Analytics for MarkView, click ... for BI_Bundle.zip.
4. Select **"File is located on the client computer and will be copied to the server for processing"** and click **OK**.
5. Navigate to <distribution_directory>\Analytics_BI\BI_Bundle.zip and click **Open**.
6. Select **Create new project** and then click **Next**.
7. Enter a project name, such as <KAMV>.
8. Set the database connection information for the Meta and Data databases:
   - Database type: Oracle
   - Provider name: ODP.NET Provider is the default value
   - TNS Name
   - User Name
   - Password

9. You can click **Connect** to test each database.
   The circular indicator turns green if the connection is successful.
10. Click **Next**.
11. In the **Confirmation** window, click **Yes** to import the data.
12. Set the following information for the Kofax Analytics for MarkView schema.
    - Database type: Oracle
    - Provider name: ODP.NET Provider is the default value
    - TNS Name
    - User Name
    - Password

    The prompt to enter the schema connection properties appears twice.
13. Click **Connect** to test the connection.
    The circular indicator turns green if the connection is successful.
14. Click **Next**.
15. Open a web browser and enter the URL such as `http(s)://<host>:<port>/Insight/View` where `<host>` is the name of the server where you installed Insight and `<port>` is the port used by Insight.
16. Log in to the Kofax Analytics for MarkView viewer as Administrator and navigate to **Administration** > **Parameters** to configure view parameters.

Run the Initialize plan

Use the procedure to run the Initialize execution plan.

1. Start **Insight Data Loader** and enter the login credentials for the Administrator.
2. On the **Data Load Module** tab, locate the **Initialize** plan and select the checkbox next to it.
    a. In the **Date range** section, select **Beginning of times** to **Current time**.
    b. Check **Save "To date" as the date of last successful load** and click **Run plan**.
    c. After the data for the Initialize Plan is loaded successfully, return to the list of plans and clear the checkbox.

Install the Workflow Agent and Windows Service

If you do not plan to use Kofax Capture and Kofax Transformation Modules with Kofax Analytics for MarkView, skip this section and continue to Set up Kofax Analytics for MarkView.

The Workflow Agent is the mechanism used by workstations, central and remote sites to collect and send data from your Kofax Capture with Kofax Transformation Modules installation to the Workflow Agent that runs as a Windows Service.

Install the Workflow Agent for all Kofax Capture workstations, remote sites, and Kofax Transformation Modules Validation stations in your installation.

Use the Kofax Analytics for MarkView installer to install and configure the Workflow Agent and Windows Service automatically.

1. Run `<distribution_directory>\Kofax Analytics for Markview.msi`, where `<distribution_directory>` is the location where you downloaded and extracted the installation package.

   The Kofax Analytics for MarkView Setup Wizard appears.
2. Click **Next** to start the installation.

   The license agreement window appears.
3. Review the license agreement, accept the terms, and click **Next**.
4. When prompted to select the installation type, click **Install/Update the Workflow Agent and Windows Service**.

   Install the Workflow Agent and Windows Service on the same drive where Kofax Capture is installed.

   The Kofax Analytics for MarkView installer defines the default installation path automatically according to the Windows Registry settings. You can change the default installation path.
5. The Kofax Analytics for MarkView installer copies the Workflow Agent and Windows Service files to a directory created by the installer, runs KMWA.WindowsService, and registers the Workflow Agent.
6. Click **Finish** to complete the installation.

Chapter 4

Upgrade Kofax Analytics for MarkView

This chapter assumes that the following Kofax products are currently installed:

- Kofax Insight
- Kofax MarkView for Oracle EBS with the required fix pack
- Kofax Analytics 1.1.x for MarkView

Use the procedure in this chapter to update to Kofax Analytics 1.2.0 for MarkView.

You can use Kofax Analytics for MarkView following the SSL protocol. To configure SSL in Kofax Analytics for MarkView perform the following steps:

- Configure MarkView using MarkView Installation or Upgrade Guide, if required.
- Configure Insight using Insight Installation or Upgrade Guide, if required.
- Configure operating system, if required.

Upgrade the Kofax Analytics for MarkView schema

If you have Kofax Analytics 1.1.x for MarkView installed, assign privileges to the existing Kofax Analytics for MarkView schema user.

1. Log in to the database as SYSDBA.
2. Navigate to <distribution_directory>\Analytics_DB\KAMV_DB, where <distribution_directory> is the location where you downloaded and extracted the installation package.
3. Run kamv_grant_privileges.sql.
4. Log in to the database as APPS.
5. Run kamv_grant_privileges_apps.sql.
6. Log in to the database as SYSDBA.
7. To create the Access Control List file for accessing HTTP services from the database, run kamv_create_acl.sql and create a new ACL for the schema that the user created earlier.
   When prompted, enter the schema username and the MarkView host name.

Upgrade schemas for Kofax Analytics for MarkView Insight project

Follow the instructions to upgrade schemas and schema objects for Kofax Analytics for MarkView Insight project.

1. Log in to the database as SYSDBA.

2. Navigate to <distribution_directory>\Analytics_DB\BI_DB\ where <distribution_directory> is the location where you downloaded and extracted the installation package.
3. For Kofax Analytics for MarkView Data schema user (KAMV_DATA), assign privileges using the `kamv_grant_privileges.sql` script.
4. For Oracle EBS version 12.2 and higher, you must also run the `alter_user_ora12_2_only.sql` script to enable editions for the KAMV_DATA schema user.

Run the Kofax Analytics for MarkView Setup Wizard

Before starting the Setup Wizard, verify that you have 32-bit or 64-bit ODAC 11, 12, or 19 installed. If 64-bit ODAC is already installed on the same system, verify that 32-bit ODAC is configured correctly, or run the Setup Wizard from a system where only 32-bit ODAC is installed.

1. Run <distribution_directory>\Kofax Analytics for Markview.msi, where <distribution_directory> is the location where you downloaded and extracted the installation package.
   The Kofax Analytics for MarkView Setup Wizard appears.
2. Click **Next** to start the installation.
   The license agreement window appears.
3. Review the license agreement, accept the terms, and click **Next**.
4. When prompted to select the installation type, select **Install/Update the Kofax Analytics for MarkView schema**.
5. Configure **Database connection properties** using one of the following methods:

   Note If you want to use SSL protocol, configure database connection using the custom connection string.

   - **Enter connection settings** as shown in the table:

Host:	The database host where the Kofax Analytics for MarkView and MarkView schemas are installed.
Port:	The database port number.
SID or **Service Name**:	The system ID or the service name.
KAMV Schema Username:	The Kofax Analytics for MarkView schema user.
KAMV Schema Password:	The Kofax Analytics for MarkView schema user password.
KAMV DATA Schema Username:	The KAMV_DATA schema username.
KAMV DATA Schema Password:	The KAMV_DATA schema password.
MarkView Schema Username:	The MarkView schema user.
MarkView Schema Password:	The MarkView schema user password.

KAMV Tablespace:	The tablespace created for tables and data.
KAMV Indexspace:	The tablespace created for indexes.

- **Enter connection strings** as in the template below:

```
SERVER=(DESCRIPTION=(ADDRESS_LIST=(ADDRESS=(PROTOCOL=<protocol>)(HOST=<host>)
(PORT=<port>)))(CONNECT_DATA=(<SID/SERVICE_NAME>=<SID or service name
 value>)));user id=<user name>;pwd=<password>;
```

where

<protocol>	is a protocol value such as TCP or TCPS.
<host>	is a database host name.
<port>	is a database port.
<SID/SERVICE_NAME> parameter	Use the SERVICE_NAME parameter to identify the Oracle9i or Oracle8 database service to access.
	Use the SID parameter to identify the Oracle8 database instance by its Oracle System Identifier (SID). If the database is Oracle9i or Oracle8, use the SERVICE_NAME parameter rather than the SID parameter.
<SID or service name value>	is a value of the SID or SERVICE_NAME parameter
<user name>	is a Kofax Analytics for MarkView schema username
	is a KAMV_DATA schema username
	is a MarkView schema username
<password>	is a Kofax Analytics for MarkView password
	is a KAMV_DATA password
	is a MarkView password

6. Click **Test connection** to verify that the connection data is valid.
7. The installer identifies the Kofax Analytics for MarkView database and Oracle EBS version and starts the corresponding SQL scripts.
8. When the installation is complete, click **Finish** to close the wizard.

Upgrade the Kofax Analytics for MarkView Insight project

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

You can also install the Insight license. See the *Kofax Insight Administrator's Guide* for licensing information.

1. Copy and replace all the contents of the <distribution_directory>\Analytics_BI\Resources directory to the Insight installation directory, such as:

   C:\Program Files\Kofax\Insight 6.4

   where <distribution_directory> is the location where you downloaded and extracted the installation package
2. From the Windows Start menu, run **Setup Analytics Project** and enter the login credentials for the Administrator.

   The default administrator login credentials are:
   - Login name: Administrator
   - Password: The password you entered during the Kofax Insight installation.

   > **Note** If you did not install the Insight license, a prompt to download the license appears. Import the license file provided by your Kofax representative.
3. In the **"Select a Kofax Analytics Solution .zip file"** field click ... to browse the bundle
4. Select **"File is located on the client computer and will be copied to the server for processing"** and click **OK**.
5. To add the built-in views, records, and metrics for Kofax Analytics for MarkView, navigate to <distribution_directory>\Analytics_BI\BI_Bundle.zip and click **Open**.

   If a prompt to overwrite the information appears, click **Yes**.
6. Select **"Update the existing project"**.
7. Select the existing Kofax Analytics for MarkView project.
8. Click **Next** and wait until the project upload is finished.
9. Set the following information for the Kofax Analytics for MarkView schema.
   - Database type: Oracle
   - Provider name: ODP.NET Provider is the default value
   - TNS Name
   - User Name
   - Password

   The prompt to enter the schema connection properties appears twice.
10. Click **Connect** to test the connection.

    The circular indicator turns green if the connection is successful.
11. Click **Next**.

12. After upgrading your Kofax Analytics for MarkView project, you need to reset the parameters.
    a. Open a web browser and enter the URL such as `http(s)://<host>:<port>/Insight/View` where `<host>` is the name of the host where you installed Insight and `<port>` is the port used by Insight.
    b. Log in to the Kofax Analytics for MarkView viewer as Administrator and navigate to **Administration** > **Parameters** to reset the parameters.

Run the Upgrade Analytics plan

Use the following procedure to run the Upgrade Analytics execution plan. Follow the steps in this section to run the Upgrade Analytics execution plans: 1.1.2, 1.1.2.1, 1.1.2.4, 1.2. For the Upgrade Analytics 1.1.2.2 plan, see Run the Upgrade Analytics 1.1.2.2 plan.

Note Direct upgrade path is not supported. You must consecutively run the required Upgrade Analytics plans according to the following table.

Previous version	Upgrade plans required to be run				
	1.1.2	1.1.2.1	1.1.2.2	1.1.2.4	1.2.0
1.1.x	+	+	+	+	+
1.1.2		+	+	+	+
1.1.2.1			+	+	+
1.1.2.2				+	+
1.1.2.4					+

1. Start **Insight Data Loader** and enter the login credentials for the Administrator.
2. Open **Data Load Module** and, on the list of plans, select the check box next to **Load** for the **Upgrade Analytics x.x.x** plan.
3. In the **Date range** section, select **Beginning of times** to **Current time**.
4. Click **Run plan** to initialize the **Upgrade Analytics x.x.x** execution plan.
5. After the data for the Upgrade Analytics plan is loaded successfully, return to the list of plans and clear the check box.
6. If required, repeat all steps for the next plan from your upgrade path.

Run the Upgrade Analytics 1.1.2.2 plan

1. Start **Insight Data Loader** and enter the login credentials for the Administrator.
2. On the **Load Console** tab, find the **Main Load Data** plan and click **Success** in the **Status** section.
3. Turn on the **Advanced mode** to open **Data load details**.
4. Scroll down to locate the line with the type **Task**.
5. View the date and time in the **To** column and write out the execution start time for future use.
6. Open **Data Load Module** and, on the list of plans, select the check box next to **Load** for the **Upgrade Analytics 1.1.2.2** plan.
7. In the **Date range** section, select **Beginning of times** to **Current time**.
8. Click **Run plan** to initialize the **Upgrade Analytics 1.1.2.2** execution plan.

9. After the data for the Upgrade Analytics plan is loaded successfully, return to the list of plans.
10. Load the **Load historical data (step 1 - main data)** plan with the following options.
    - **From date**: Date and time from step 5 in the following format: MM/DD/YYYY HH12:MI AM/PM.
    - Select the **Save "To date" as the date of last successful load** option.
    - **To date**: Current time.
11. Load the **Load historical data (step 2 - processes)** plan with the following options.
    - **From date**: Date and time from step 5 in the following format: MM/DD/YYYY HH12:MI AM/PM.
    - **To date**: Current time.
12. If required, repeat all steps for the next plan from your upgrade path.

Upgrade the Workflow Agent and Windows Service

If you do not plan to use Kofax Capture and Kofax Transformation Modules with Kofax Analytics for MarkView, skip this section and continue to Set up Kofax Analytics for MarkView.

To upgrade the Workflow Agent and Windows Service, follow the steps in this section. Use the Kofax Analytics for MarkView installer to upgrade and configure the Windows Agent and Windows Service automatically.

Note Upgrade the Workflow Agent for all Kofax Capture workstations, remote sites, and Kofax Transformation Modules Validation stations in your installation.

1. Start the Kofax Capture Administration module.
2. In the **Batch** tab, right-click **MarkView Invoice** and select **Properties**.
   The **Batch Class Properties** window opens.
3. In the **Workflow Agent** tab, select the Kofax Analytics for MarkView Workflow Agent and click **Remove**.
   Apply changes and close the window.
   If you have any additional Invoice Batch Classes, repeat this procedure for all of them.
4. Close all Kofax Capture modules.
5. Run `<distribution_directory>\Kofax Analytics for Markview.msi`, where `<distribution_directory>` is the location where you downloaded and extracted the installation package.
   The Kofax Analytics for MarkView Setup Wizard appears.
6. Click **Next** to start the upgrade.
   The license agreement window appears.
7. Review the license agreement, accept the terms, and click **Next**.
8. When prompted to select the installation type, click **Install/Upgrade the Workflow Agent and Windows Service**.
   Install the Workflow Agent and Windows Service on the same drive where Kofax Capture is installed.
   The Kofax Analytics for MarkView installer defines the default installation paths automatically according to the Windows Registry settings. You can change the default installation paths.

9. The Kofax Analytics for MarkView installer copies the Workflow Agent and Windows Service files to a directory created by the installer, runs KMWA.WindowsService, and registers the Workflow Agent.
10. Click **Finish** to complete the upgrade.

Chapter 5

Set up and configure Kofax Analytics for MarkView

This chapter describes the administration tasks needed to set up, configure and optimize Kofax Analytics for MarkView system performance.

Set up Kofax Analytics for MarkView

This chapter assumes that you have completed the tasks described in Install Kofax Analytics for MarkView or Upgrade Kofax Analytics for MarkView.

Enable Kofax Analytics for MarkView in Kofax MarkView Export Connector (optional)

Skip this step if you do not want to use Kofax Capture and Kofax Transformation Modules with Kofax Analytics for MarkView.

If you plan to use Kofax Analytics for MarkView with Kofax Capture and Kofax Transformation Modules, enable the integration after you install Kofax MarkView Export Connector. Perform the following steps for all systems where Kofax MarkView Export Connector is installed.

1. In the Kofax MarkView Export Connector installation directory, locate the Kofax.MarkViewExport.Notifier.dll.config file and open it for editing.
2. To enable Kofax Analytics for MarkView, locate the "EnableKofaxAnalytics" key and set the value to true as follows:

```
<appSettings>
            <add key="EnableKofaxAnalytics" value="true"/>
            …
        </appSettings>
```

3. Save the .config file and reopen Kofax Capture.

Disable support for Kofax Capture (optional)

Skip this step if you want to use Kofax Capture and Kofax Transformation Modules with Kofax Analytics for MarkView.

If you do not plan to use Kofax Capture and Kofax Transformation Modules with Kofax Analytics for MarkView, in Kofax Analytics for MarkView database schema, run the following script and commit the changes.

```
update KAMV_PARAMETERS set PARAMETER_VALUE = '0' where PARAMETER_NAME = 'KC_ENABLED'
```

Note Do not run the script if you use Kofax Capture and Kofax Transformation Modules. The script removes Kofax Capture views from the Kofax Analytics for MarkView viewer.

To enable Kofax Capture and Kofax Transformation Modules again, follow the instructions in Reactivate support for Kofax Capture.

Concurrent user Kofax Insight license

Kofax Analytics for MarkView is available with a concurrent user Kofax Insight license that is based on the number of sessions. The concurrent license allows a fixed number of users access to the product at a given time.

If you plan to use a concurrent user Kofax Insight license, verify that you:

1. Configure the automated logout function following the instructions in Configure automated logout.
2. Set up the session timeout function following the instructions in Set session timeout.
3. Always click the Logout icon before you exit the browser to end a session.

A session ends only if:

- The user clicks the Logout icon.
- No user activity occurs for a certain number of minutes while the browser is open. See Configure automated logout.
- The user closes the browser without clicking the Logout icon, and then a certain number of minutes go by. See Set session timeout.

Configure automated logout

When the automated logout is configured, a user is logged out automatically if no activity occurs after a certain number of minutes. The automated logout is useful to ensure that the number of active user sessions does not exceed the maximum supported under a concurrent license.

If users enable the automated logout function, they are logged out after a specified period of time without user activity.

Enable automated logout as follows:

1. In `<Insight_installation_directory>\HtmlInsight\View`, open web.config for editing.
2. Locate the Insight.Web.AutoLogout parameter and set the value to `true`.
3. Locate the Insight.Web.AutoLogoutInterval parameter and set the numeric value for the auto logout interval, such as 15 minutes.
4. Save the changes.

Set session timeout

You can specify how long (in minutes) a session remains active after a user closes the browser without clicking the Logout icon. After the specified number of minutes goes by, the session timeout occurs. Similar to the automated logout, the session timeout helps to ensure that the number of active sessions does not exceed the maximum supported under a concurrent license.

Set up the session timeout function as follows to use a concurrent user Kofax Insight license:

1. In <Insight_installation_directory>\WcfDataService, open web.config for editing.
2. Locate the Insight.DataService.SessionTimeout parameter and set the numeric value to 20 (minutes).
3. Save the changes.

Set up the Workflow Agent

If you do not plan to use Kofax Capture and Kofax Transformation Modules with Kofax Analytics for MarkView, skip this section and continue to System configuration.

After the installation of the Workflow Agent and Service is completed, you need to associate the Workflow Agent with a MarkView Invoice batch class and configure the connection string for the Workflow Agent.

Configure the Workflow Agent

You only need to associate the Workflow Agent with a MarkView Invoice batch class once on a Central Site or Server where the Administration module can be started.

1. Open the Kofax Capture Administration module.
2. On the **Definitions** pane, select the **Batch** tab and right-click **MarkView Invoice**.
3. In **Properties**, click the **Workflow Agents** tab and select **Kofax Analytics for MarkView**.
4. Add the Workflow Agent you just installed to the **Selected Workflow Agents** area.
   Apply changes and close the window.
   If you have any additional Invoice Batch Classes, repeat this procedure for all of them.

Configure the connection string

Specify the connection data for the Workflow Agent once on the Kofax Capture Server.

1. Open the Kofax Capture Administration module.
2. Right-click **MarkView Invoice** and select **Configure Kofax Analytics for MarkView**.
   If you have any additional Invoice Batch Classes, repeat this procedure for all of them.
3. Enter the connection string as in the template example below:

```
SERVER=(DESCRIPTION=(ADDRESS_LIST=(ADDRESS=(PROTOCOL=<protocol>)(HOST=<host>)
(PORT=<port>)))(CONNECT_DATA=(<SID/SERVICE_NAME>=<SID or service name
 value>)));user id=<user name>;pwd=<password>;
```

   where

`<protocol>`	is a protocol value such as TCP or TCPS.
`<host>`	is a database host name.
`<port>`	is a database port.

<SID/SERVICE_NAME> parameter	Use the SERVICE_NAME parameter to identify the Oracle9i or Oracle8 database service to access.
	Use the SID parameter to identify the Oracle8 database instance by its Oracle System Identifier (SID). If the database is Oracle9i or Oracle8, use the SERVICE_NAME parameter rather than the SID parameter.
<SID or service name value>	is a value of the SID or SERVICE_NAME parameter
<user name>	is a Kofax Analytics for MarkView user name
<password>	is a Kofax Analytics for MarkView password

or configure the **Connection settings** as follows:

Hostname:	The host name or address of the Database Server where the Kofax Analytics for MarkView Database is deployed.
Port:	The port number of the database listener.
SID or **Service Name**:	The system ID or the service name used to access the Database Server.
Username:	The Kofax Analytics for MarkView schema user name.
Password:	The Kofax Analytics for MarkView schema user password.

4. Click **Test**.
   If the test is successful, you see a Connection Successful message.
5. Click **OK** to save changes.
6. On the **Definitions** pane, right-click **MarkView Invoice** and select **Publish** to publish the batch class.
   After you publish the batch class, the information about the connection data is available.

Note Specify the connection data before using the Workflow Agent. Otherwise, the Workflow Agent generates error messages in the log file and fails to send batch objects to the Service.

Configure the Kofax Insight Data Loader

Follow the steps in this chapter to use Kofax Insight Data Loader to configure execution plans that update historic or current data for use with Kofax Analytics for MarkView.

Load data to update the Kofax Analytics for MarkView database information about invoices in Oracle EBS and Kofax MarkView. Depending on the amount of data stored in Oracle EBS and MarkView, data load operations can take some time.

The data load process includes two types of operations:

- Load historical data: Load historical information related to invoices that were processed and paid in the past. Loading of historical data should be executed only once after the installation of Kofax Analytics for MarkView but before you start using the product.
- Load current data: Perform periodically after initially loading historical data. Loading of current data keeps your Kofax Analytics for MarkView database up-to-date.

The data load procedure is performed by administrators who are familiar with Kofax MarkView and Kofax Insight. Administrators should be aware of:

- The approximate number of invoices processed within a certain period of time on the system.
- Whether it is required to load the historical data.
- The exact period of time for the historical data load.

Before you proceed to loading data, verify that:

1. You upgraded Kofax MarkView to the required version. See the *Technical Specifications* document.
2. You completed all the applicable steps to install Kofax Analytics 1.2.0 for MarkView.
3. The AP_INVOICES_ALL table in the APPS schema has the index for the LAST_UPDATE_DATE column.

   For more detailed information about the index for the LAST_UPDATE_DATE column, see "Creating Custom Indexes in Oracle EBS Source Databases for Incremental Load Performance" in the *Oracle Business Intelligence Application Performance Recommendations* document.
4. The AP_INVOICE_DISTRIBUTIONS_ALL table in the APPS schema has the index for the LAST_UPDATE_DATE column.
5. The SF_WORKITEM_QUEUE_VISIT table in the MarkView schema has the index for the ENQUEUED_TIMESTAMP column.

Query timeout

Increase the query timeout value to prevent possible interruption during the process of loading historical data, which can be time-consuming.

1. Start Kofax Insight Studio and log in as Administrator.
2. Under **Data Sources**, click **Data DB**.
3. Click **Query timeout** to set the value and save the changes.

   We recommend that you set this value to 1,200 seconds.

Load historical data

Load historical data to get information about invoices that were already processed in Oracle EBS and Kofax MarkView in the past. As to the invoices processed in Kofax Capture, you can only load historical data for Kofax Capture starting from the moment you have installed Kofax Analytics for MarkView and Workflow Agent.

The following Kofax Analytics for MarkView views contain historical data:

- Search views
- Invoices and Discounts

- Hold
- Spend
- Invoice Touches
- Payment Performance
- Volume Usage
- Supplier Performance
- Operator Performance - MarkView

Note Skip loading of historical data if you do not need to display the information about invoices processed in the past. Proceed to Load current data.

Before you proceed to data loading, define the start date and the approximate number of historical invoices stored in MarkView and Oracle EBS. All historical invoices processed before the start date will not be loaded into the Kofax Analytics for MarkView project.

You can load historical data all at once or in "subsets" based on a time period. Loading all historical data at once can take a long time impacting the overall system performance. Depending on the amount of historical data you want to load, you may consider breaking up the data to be loaded into subsets. When configuring the data load process, create a download schedule where you specify each subset of historical data.

Note We recommend that you do not load more than 100,000 invoices at a time. If you have more than 100,000, split your data into subsets as described in the following procedure. For example, if you process less than 100,000 invoices per year, you can set the time frequency to "1 year."

1. Start Kofax Insight Data Loader and log in as the Kofax Insight administrator.
2. On the **Execution Plans** tab, locate the **Load historical data (step 1 - main data)** plan and in the **Frequency** column, click ....

   The **KAMV: Load historical data (step 1 - main data)** scheduling window appears.
3. In the **Data load type** section, select **Historic data load**.
4. In the **Schedule** section, set the start time for loading of the next subset using one of the available options:
   - **Manual**: Manually initiate the data load of the next subset.
   - **Every day, at specific times**: Schedule loading of the historical data to every day at a specific time.

     For example, loading of historical data can be scheduled for 10:00AM, 12:00PM, 14:00PM, 16:00PM.
   - **Every** option: Schedule loading of the historical data after a certain period of time.

     Use **From** and **To** fields to set the time of a day to periodically load historical data. Use these fields to pause the data load during hours when MarkView or Oracle EBS are unavailable due to maintenance work, such as backup operations.
5. In the **Historic interval** section, specify the period for which you plan to load the historical data:
   - **From**: Start date
   - **To**: End date

6. In the **Historic interval** section, use the **Frequency** field to set the subset value.
   Frequency is the data load subset for one load operation. We recommend that you set Frequency to a value that does not exceed 100,000 invoices per a subset. The next scheduled subset starts only after the previous one is finished.

   Note Make sure that you select the **Chronological order** option. If you do not select the option, your data results may be inconsistent.

7. Click **OK** to confirm your selections.
   A message confirms that the plan is scheduled.
8. Click **OK** to close the success message.
9. On the **Load Console** tab, view the status of all subsets that you configured.

   Note If any subset load does not succeed, troubleshoot an error and fix it before you proceed to the following steps. For example, the error may result from timeout settings. To proceed with data load after the error, run the step:"Load historical data (step 1 - main data)" for the failed time frame. See Reload data.

10. When all the historical data is loaded, on the **Execution Plans** tab, locate the **Load historical data (step 2 - processes)** plan and in the **Frequency** column, click ....
11. Repeat steps 3-9 for this plan.

    Note If any subset load does not succeed, troubleshoot an error. For example, the error may result from timeout settings. To proceed with data load after the error, run the step: "Load historical data (step 2 - processes)" for the failed time frame. See Reload data.

Load current data

Loading of current data is required to keep the Kofax Analytics for MarkView database up to date with information about new and updated invoices in Oracle EBS and MarkView. If you loaded historical data, schedule the loading of current data after you finish loading all historical data.

1. Start Kofax Insight Data Loader and log in as the Kofax Insight administrator.
2. On the **Data Load Module** tab, locate the **Load on-going data** plan and select the check box next to it.

3. Set the following values:
    - **From date**: Select the **Specific date** option and set the start of the current day value. For example, set the value to 12:00 AM of the current day.

      If you performed the historical data load, set the **From date** value to the same value configured previously in the **To** field of the **Historic interval** section.

      Make sure that you select **Save "To date" as the date of last successful load**.
    - **To date**: Select **Current time**.
4. Click **Run plan**. This manual data load must be performed once to configure the "Last successful load date" parameter before you proceed to schedule the Main Load Data execution plan.
5. After the data is loaded successfully, go to the **Execution plans** tab and locate the **Load on-going data** plan.

   In the **Frequency** column, click ....

   The **KAMV: Load on-going data scheduling** window appears.
6. In the **Schedule** section, specify how often to load the updated information about invoices:
    - **Manual**: Manually initiate the data load. Not recommended for loading current data.
    - **Every day, at specific times**: Schedule loading of the updated data to every day at specific time.

      For example, loading of the updated data can be scheduled for 10:00AM, 12:00PM, 14:00PM, 16:00PM.
    - **Every** option: Schedule loading of the updated data after a certain period of time. We recommend that you use this option.

      Use **From** and **To** fields to set the time of a day when to periodically load current data. Use these fields to pause the data load during hours when MarkView or Oracle EBS are unavailable due to maintenance work, such as backup operations.
7. If you selected the **Every** option, specify the loading frequency and time values.
8. You can specify an additional loading time value to prevent the data load during night time when MarkView and Oracle EBS are not available because of backup procedures.
9. In the **From date** section, select **Last successful load date**.
10. In the **To date** section, select **Current time**.
11. Click **OK** to confirm your selections.

    A message confirms that the plan is scheduled.
12. Click **OK** to close the success message.
13. On the **Load Console** tab, view the status of your plan.

Reload data

If your historical or current data load failed, you can reload the data by performing one of the following procedures:

- To reload one subset of data for a specified time period, follow the steps in Reload data for one subset.
- To reload several consecutive subsets in a row, follow the steps in Reload data for several subsets.

Note Before you proceed to reloading your data, you need to specify the time period for the subset failed load. Write down these values to use them when running the required plans later.

Specify the time period

To specify the time period for the subset failed load, perform the following steps.

1. Start Kofax Insight Data Loader and log in as the Kofax Insight administrator.
2. On the **Load console** tab, in the **Status** section, locate the line (subset) that has not **Success** status and click **Success** for the preceding line.
3. Turn on the **Advanced mode** to open **Data load details**.
4. Scroll down to locate the line with the type **Task**.
5. View the date and time in the **To** column.

   These date and time correspond to the required **From date** value.
6. On the **Load console** tab, in the **Status** section, locate the line (subset) that has not **Success** status and click **Success** right for the next line.

   If you have several consecutive subsets with not **Success** status, click **Success** right for the last failed subset.
7. Turn on the **Advanced mode** to open **Data load details**.
8. Scroll down to locate the line with the type **Task**.
9. View the date and time in the **From** column.

   These date and time correspond to the required **To date** value.

Reload data for one subset

Before you proceed to reloading your data, unschedule your currently running data execution plan.

1. Start Kofax Insight Data Loader and log in as the Kofax Insight administrator.
2. On the **Data Load Module** tab, locate the **Load historical data (step 1 - main data)** plan.
3. In the **From date** section, select **Specific date** and set the start time of the failed data load.
4. In the **To date** section, select **Specific date** and set the end time of the failed data load.
5. Click **Run plan**.
6. When all the data is loaded, on the **Data Load Module** tab, locate the **Load historical data (step 2 - processes)** plan and repeat steps 3-5 for this plan.

Reload data for several subsets

Before you proceed to reloading your data, unschedule your currently running data execution plan.

1. Start Kofax Insight Data Loader and log in as the Kofax Insight administrator.
2. On the **Execution Plans** tab, locate the **Load historical data (step 1 - main data)** plan and, in the **Frequency** column, click ....

   The **Load historical data (step 1 - main data)** scheduling window appears.

3. In the **Schedule** section, set the start time for loading of the next subset:
   - **Every day, at specific times**: Schedule loading of the data to every day at specific time.

     For example, loading of the data can be scheduled for 10:00AM, 12:00PM, 14:00PM, 16:00PM.
   - **Every**: Schedule loading of the historical data after a certain period of time.

     Use the **From** and **To** fields to set the time of a day when to periodically load historical data. Use these fields to pause the data load during hours when MarkView or Oracle EBS are unavailable due to maintenance work, such as backup operations.
4. In the **Historic interval** section, specify the failed load period for which you plan to reload the historical data:
   - **From**: Start date
   - **To**: End date

     Note The End date includes the data until 12:00 AM of the set day. For example, if you want to load the data until 8/5/2021 inclusively, set the value to August 6, 2021.
5. In the **Historic interval** section, use the **Frequency** field to set the subset value.

   Frequency is the data load subset for one load operation. We recommend that you set **Frequency** to a value that does not exceed 100,000 invoices per a subset. The next scheduled subset load starts only after the previous one is finished.

   Note Make sure that you select the **Chronological order** option. If you do not select the option, your data results may be inconsistent.
6. Click **OK** to confirm your selections.

   A message confirms that the plan is scheduled.
7. Click **OK** to close the success message.
8. On the **Load Console** tab, view the status of all subsets load that you configured.
9. After all the historical data is loaded successfully, return to the list of plans, locate the **Load historical data (step 2 - processes)** plan, and, in the **Frequency** column, click ....
10. Repeat steps 3-8 for this plan.

Delete data

If you intend to delete the Kofax Analytics for MarkView data, the entire data set is affected. You cannot delete or reload only part of the data.

1. Start **Insight Data Loader** and enter the login credentials for the Administrator.
2. On the **Data Load Module** tab, locate **Delete All Data** and select the checkbox next to it.
3. In the **Date range** section, click **Run plan** to run the **Delete All Data** execution plan.

   If you use Kofax Capture and Kofax Transformation Modules, the Kofax Capture data is loaded, too.

System configuration

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

Configure access to Kofax Analytics for MarkView from MarkView

Configure your MarkView menu to access Kofax Analytics for MarkView from MarkView.

1. From MarkView home, select **Administration** > **Module Admin**.
2. Select **Menu Item**.
3. Scroll to the bottom of the page and click **Insert**.
4. Complete the form and click **Insert** again to save the changes.
    - **Menu Name**: Main Menu
    - **Menu Sequence**: Next available value for Main Menu items.
    - **Item Type**: URL
    - **Default Item Label**: The name that appears in the interface, such as Kofax Analytics for MarkView.
    - **Item Value**: The URL link to the Kofax Analytics for MarkView home page in the following format:

      `http(s)://<host>:<port>/Insight/View/`

      Where `<host>` is the name of the server where you installed Insight and `<port>` is the port used by Insight.
    - **MV Home Aware**: Y

When you add a menu item, the item remains inactive until you assign it to a user group. For more information about assigning menu items to User Groups, see the *Kofax MarkView Administrator's Guide, Volume 1*.

User authorization in Kofax Analytics for MarkView

The Kofax Analytics for MarkView viewer user is the same as the MarkView user.

Verify that a user profile meets the following requirements:

- The user is enabled in MarkView.
- The user is added to the MV Analytics user group.

  Note You can create a number of groups for Kofax Analytics for MarkView to add different set of organizations.
  When you create the Kofax Analytics for MarkView user group, specify the group name as follows:
  "MV Analytics - xxx", where "- xxx" is a unique value.

- The MV Analytics user group is assigned for at least one organization in MarkView.

After a user is added to MarkView, verify that the viewer user follows the procedures in this section to ensure that data appears on the Kofax Analytics for MarkView viewer as expected.

1. To access Kofax Analytics for MarkView, open a web browser and enter the URL such as `http(s)://<host>:<port>/Insight/View`, where `<host>` is the name of the server where you installed Insight and `<port>` is the port used by Insight.

   Note The URL address is defined by the settings used for IIS during Kofax Insight installation.

2. Log in to Kofax Analytics for MarkView using the MarkView user name and password.
3. Verify that you have access to the predefined data for organizations.

   Note Kofax Analytics for MarkView supports all organizations that a user is authorized in MarkView and Oracle EBS.

User authorization for invoice actions in MarkView

Kofax Analytics for MarkView lets authorized users take actions on invoices. You can Increase Priority, Reassign, or Escalate an invoice.

The MarkView administrator sets the access to Kofax Analytics for MarkView invoice actions in MarkView.

Increase Priority

The Increase Priority action is available with standard MarkView installation. To set the access to the Increase Priority action:

1. Log in to MarkView as the administrator and navigate to **Administration** > **MarkView Admin**.
2. Select **Toolsets** and click **Add**.
3. Enter the toolset name such as Analytics Toolset and the sequence, and click **Save**.
4. To create new mapping between the new toolset and the existing MarkView tools, select the **Toolsets Tool** tab and click **Add**.
5. Click **Select Tool** and in the List of Values, locate the **Increase Priority** Tool.
6. Add the **Increase Priority** Tool to the appropriate Analytics Toolset and click **Save**.
7. Open User Groups and select the appropriate MV Analytics group or create a new one for users that must be authorized for Increase Priority action.
8. Open details, select the **Document Toolset Auths** tab, and click **Add** to add new document-toolset authorization mapping.
9. In the **Document Type** filed, select **ALL**.
10. In the Toolset field, select the toolset that you created for the Increase priority action such as Analytics Toolset and click **Save**.

After you added the **Increase Priority** Tool to the appropriate User Group, the members of this group are authorized to use the Increase Priority action in Kofax Analytics for MarkView.

Reassign

To set the access to the Reassign action:

1. Log in to MarkView as the administrator and navigate to **Administration** > **MarkView Admin**.
2. Open the **Tools** tab and locate **Reassign Document** Tool in the list.
    - If you have the **Reassign Document** Tool, follow the same process to add the tool to the appropriate user group as for the **Increase Priority** Tool.

      After you added the **Reassign Document** Tool to the appropriate User Group, the members of this group are authorized to use the Reassign action in Kofax Analytics for MarkView.
    - If you do not have the **Reassign Document** Tool, open the **User Groups** tab and create a new MarkView group and add users.

      The user group name must be MV ANALYTICS REASSIGN which is case-insensitive.

Escalate

To set the Escalate Document action:

1. Log in to MarkView as the administrator and navigate to **Administration** > **MarkView Admin**.
2. Open the **Tools** tab and locate **Escalate Document** Tool in the list.
    - If you have the **Escalate Document** Tool, follow the same process to add the tool to the appropriate user group as for the **Increase Priority** Tool.

      After you added the **Escalate Document** Tool to the appropriate User Group, the members of this group are authorized to use the Escalate action in Kofax Analytics for MarkView.
    - If you do not have the **Escalate Document** Tool, open the **User Groups** tab and create a new MarkView group and add users.

      The user group name must be MV ANALYTICS ESCALATE which is case-insensitive.

Note If you do not have **Reassign Document** or **Escalate Document** Tool installed in MarkView, the MarkView Viewer **Action History** does not display new items after reassign or escalate action in Kofax Analytics for MarkView.

Access security for cookieless setting (optional)

The cookieless feature may be a security issue for users that send URLs to other users. If the feature is turned on, and the user sends the URL address to another user, the other user can automatically log on to the server without credentials.

For security purposes, you may need to perform additional configuration of the web.config file to restrict access to users with enabled cookieless feature:

1. Before you proceed, start and stop Insight Viewer to set the authentication mode to `"Forms"`.
2. In the `<Insight_installation_directory>\HtmlInsight\View` directory, open the web.config file for editing.
3. Locate `<authentication mode="Forms">` element.

4. Locate `t="1740" cookieless="AutoDetect" enableCrossAppRedirects="true" />` and change `"AutoDetect"` to `"UseCookies"`.

   Note If your web browser does not support cookies or has disabled cookies, you may not be able to start the Kofax Analytics for MarkView viewer.

5. Save changes and close web.config.

Timeout setting for batch deletion (optional)

Kofax Capture does not provide notifications about batches that are deleted using Batch Manager. Kofax Analytics for MarkView marks invoices as deleted if no batch notification comes within the specified time interval (the default value is 15 days).

With Kofax Analytics for MarkView, you can monitor the data about invoices associated with a deleted batch. You can configure the timeout setting if you use Batch Manager to delete batches.

To modify the time-out setting for the deleted batches, connect to the Kofax Analytics for MarkView schema, execute the following script, and commit the changes.

```
update KAMV_PARAMETERS set PARAMETER_VALUE = '<New Value>' where
PARAMETER_NAME = 'KAMV_DAYS_FOR_DELETE';
```

Where `<New Value>` is the required number of days.

Reactivate support for Kofax Capture

If you disable Kofax Capture and Kofax Transformation Modules during the installation of Kofax Analytics for MarkView and need to activate the support, follow the procedure in this section.

1. Install and configure the Workflow Agent as described in Install the Workflow Agent and Windows Service.
2. In Kofax Analytics for MarkView database schema, run the following script and commit the changes:

```
update KAMV_PARAMETERS set PARAMETER_VALUE = '1' where PARAMETER_NAME =
 'KC_ENABLED'
```

After a user logs in again, Kofax Analytics for MarkView adds the Operator Performance - Capture, Field Statistics, Line Matching, and Quality Benchmark views to the Kofax Analytics for MarkView viewer.

Repair option in Windows Control Panel

If you manually delete the Kofax Analytics for MarkView Workflow Agent or Windows Service binary files, you can use the Repair option in Windows Control Panel to restore the files.

1. Start Windows Control Panel.
2. Click **Programs and Features** and select **Kofax Analytics for MarkView** from the list.
3. Click **Repair**.

Note After you apply the Repair option, verify that the `KMWA.Agent.aex` file has a correct path to the Workflow Agent and OCX component.

Migrate your environment

Migrate your production environment to a non-production environment to test new functionality, train new users, or troubleshoot issues that you might encounter in your production environment.

Clone database schemas

Migrate your Kofax Analytics for MarkView schema with the MarkView database schema. The Kofax Analytics for MarkView schema does not require additional changes after cloning.

Use a third-party tool to clone the MarkView production database. Then, use the MarkView Migration utility to generate an SQL script to update the environment-specific MarkView URLs and design-time data on the non-production environment. For more information, see the *Kofax MarkView Installation Guide*.

Configure the connection string

Specify the connection data for the Workflow Agent once on the Kofax Capture Server.

1. Open the Kofax Capture Administration module.
2. Right-click **MarkView Invoice** and select **Configure Kofax Analytics for MarkView**.
   Kofax Analytics for MarkView Setup appears.
3. Enter the following values.
   - **Hostname**: The host name or address of the Database Server where the Kofax Analytics for MarkView Database is deployed
   - **Port**: The port number of the database listener
   - **SID** or **Service name**: The system ID or the service name used to access the Database Server
   - **Username**: The Kofax Analytics for MarkView schema user name
   - **Password**: The Kofax Analytics for MarkView schema user password
4. Click **Test**.
   If the test is successful, you see a Connection Successful message.
5. Click **OK** to save changes.
6. After you publish the batch class, the information about the connection data is available.

Note Specify the connection data before using the Workflow Agent. Otherwise, the Workflow Agent generates error messages in the log file and fails to send batch objects to the Service.

Reconfigure Kofax Insight and Kofax Analytics for MarkView

If you migrate the environment with installed and configured Kofax Insight and Kofax Analytics for MarkView project, follow the steps in this section.

- Migrating Data to an Existing Non-Production Environment: If you already have a functioning non-production environment, refresh the database with a more recent copy of the production environment. See Configuring an existing non-production environment.

- Migrating Data to a New Non-Production Environment: If you need a new non-production environment, see Configuring a new non-production environment.

Configuring an existing non-production environment

1. Clone your KAMV_ADMIN, KAMV_META, and KAMV_DATA schemas.

   Where KAMV_ADMIN is the database schema that you create when installing Insight. KAMV_META and KAMV_DATA are schemas that you create in Configure the Kofax Analytics for MarkView Insight project.
2. Start the Installation Manager using the /i switch.
3. In the Installation Manager, change the connection to KAMV_ADMIN.
4. Start Insight Admin Console and navigate to **Projects** > **KAMV**.

   Where KAMV is the name of your Kofax Analytics for MarkView project.
5. In **Connection Option**, click **Change**.
6. In the **Add Existing** tab, in Meta and Data sections, change the credentials to the new connection data and click **OK**.
7. In the documents tree, click **Connections** and select **KAMV**.
8. In the **Connection Option** section, set the following information for the Kofax Analytics for MarkView schema.
   - Database type: Oracle
   - Provider name: ODP.NET Provider is the default value
   - TNS Name
   - User Name
   - Password

   Note If you change the Kofax Analytics for MarkView schema password, change the password in the **Connection Option** section as appropriate.
9. Click **Connect** to test the connection.

   The circular indicator turns green if the connection is successful.
10. In the navigation pane, navigate to **Projects** > **KAMV** > **KAMV** and set the following information for the Kofax Analytics for MarkView schema.
    - Database type: Oracle
    - Provider name: ODP.NET Provider is the default value
    - TNS Name
    - User Name
    - Password

    Note If you change the Kofax Analytics for MarkView schema password, change the password in **Projects** > **KAMV** > **KAMV** as appropriate.
11. Click **Connect** to test the connection.

    The circular indicator turns green if the connection is successful.
12. Start Insight Studio and click **Data sources**.

13. For **KAMV** and **Data DB**, set the following information for the Kofax Analytics for MarkView schema:
    - Database type: Oracle
    - Provider name: ODP.NET Provider is the default value
    - TNS Name
    - User Name
    - Password
14. Click **Connect** to test the connection.
    The circular indicator turns green if the connection is successful.

Configuring a new non-production environment

1. Clone your KAMV_ADMIN, KAMV_META, and KAMV_DATA schemas.
   Where KAMV_ADMIN is the database schema that you create when installing Insight. KAMV_META and KAMV_DATA are schemas that you create in Configure the Kofax Analytics for MarkView Insight project.
2. Follow the instructions in Install Kofax Analytics for MarkView using the schemas you cloned earlier.

Kofax Analytics for MarkView Administration

Use the Administration tab to manage field data and configure settings that apply to invoice touches. The Administration tab is available to the Insight administrator user.

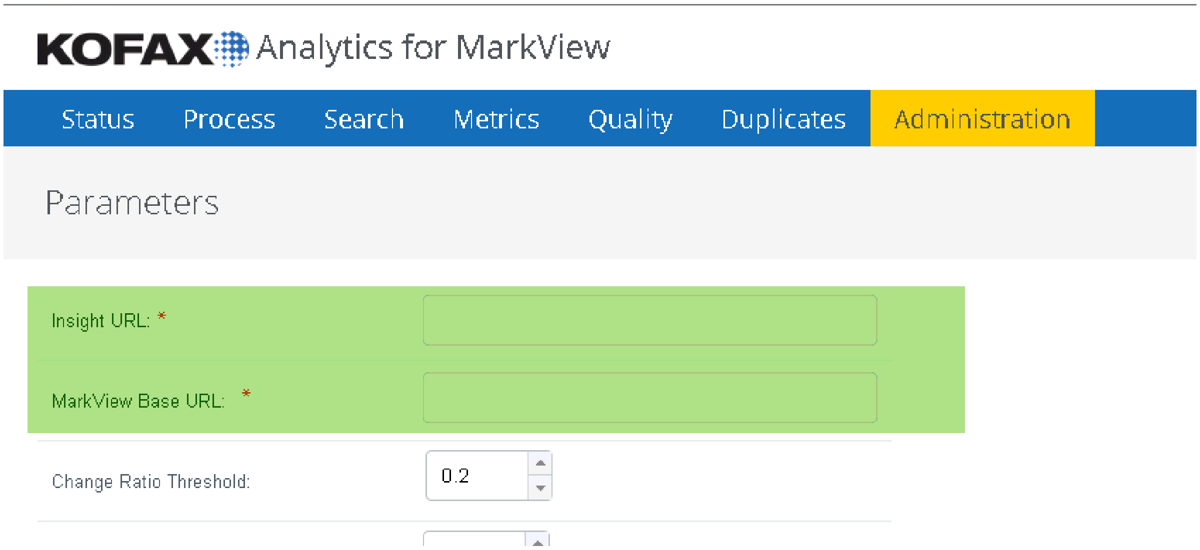
The Administration tab includes Parameters and Fields and Touches.

Configure parameters

You can manually configure some view parameters and thresholds in the Kofax Analytics for MarkView Viewer on the Administration tab.

1. Log in to Kofax Analytics for MarkView as an Administrator.
   Kofax Insight Administrator can only configure parameters and cannot view user report data.
2. On the toolbar menu, navigate to **Administration** > **Parameters**.

3. On the Parameters list, select the parameter and change the default value if required.
The settings apply to all Kofax Analytics for MarkView users. You should verify the Insight URL and MarkView Base URL.



Click a row to view a brief description of a parameter.

Change Ratio threshold

The Change Ratio threshold defines the threshold value for the field change ratio in the Field Statistics view. The default value for the field is 0.20, which corresponds to 20 percent.

The change ratio threshold is calculated as a ratio of the number of same fields changed by the operator, and the total number of fields. If the value is greater than 20 percent, the value indicator in the Field Statistics view is red. If the value is less than 20 percent, the change ratio for the field is considered acceptable.

A formula to calculate the Change Ratio value is as follows:

(CHANGED * 100)/TOTAL FIELDS = CHANGE RATIO

For example, Change Ratio for TaxAmount1 in the following image is calculated as follows:

(20 * 100)/33 = 61%

Field Statistics

FIELD NAME	TOTAL FIELDS	CONFIDENCE	CHANGED	CHANGE RATIO
TaxAmount1	33	94%	20	61%
VendorFax	33	98%	17	52%
VendorTelephone	33	98%	17	52%
Currency	953	100%	111	12%
Contact	953	100%	102	11%

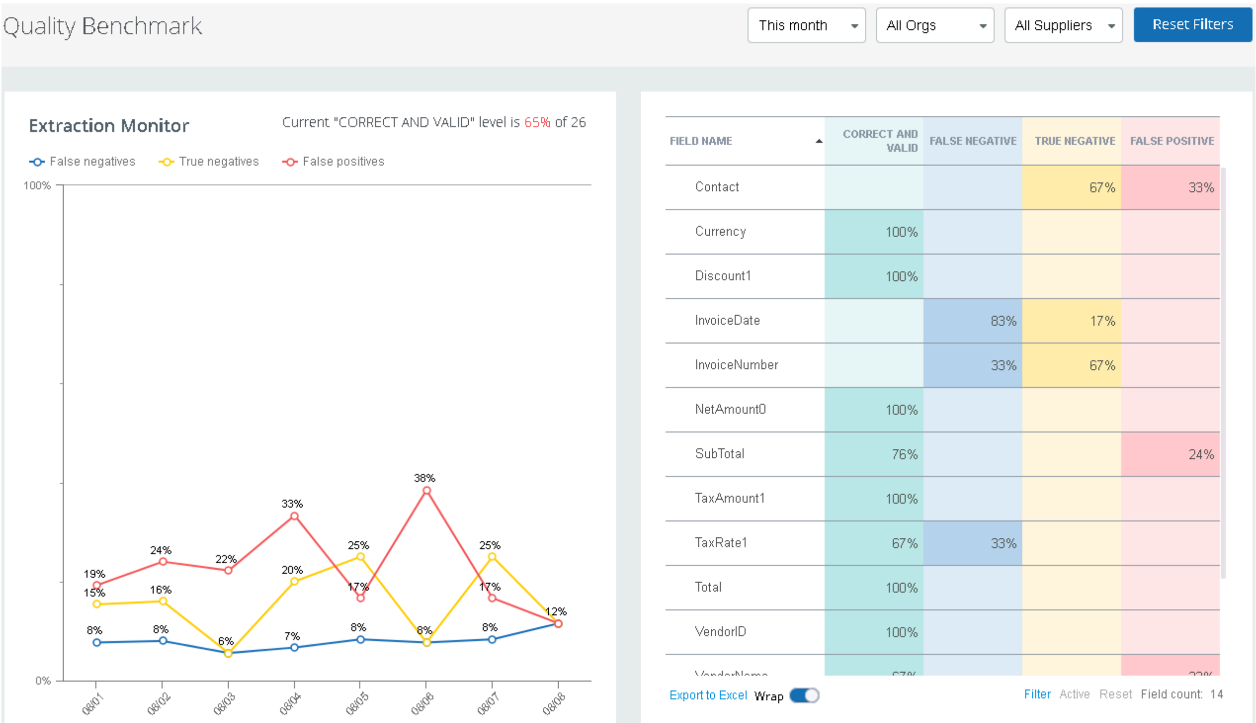
Correct and Valid Level Interval (days)

The "Correct and Valid Level Interval (days)" defines the number of days for which the current extraction Correct and Valid level is specified. The parameter is applied in the Quality Benchmark view. The default value is 1.

If the value for the Correct and Valid Level Interval is set to 1, the current "CORRECT AND VALID" level value in Extraction Monitor displays the field validation value for the current day:

- If the field validation value is lower than the threshold configured in the Correct and Valid Level Threshold during one day, the percentage value is red. See the following figure.

  The percentage value in this case is also displayed in the System Performance Pane of the Status view.
- If the field validation value exceeds the threshold configured in the "Correct and Valid threshold" during one day, the percentage value is green.
- If there is no data during one day, the percentage value is not displayed.



Correct and Valid level threshold

The Correct and Valid level threshold defines the minimum percentage value for the field validation accuracy in the Quality Benchmark view. The default value is 0.90 or 90 percent.

If the Correct and Valid level threshold exceeds 90 percent, the current "CORRECT AND VALID" level value indicator in Extraction Monitor is green. If the field validation value is lower than 90 percent, the level indicator is red for the current "CORRECT AND VALID" level.

The percentage value in this case is also displayed in the System Performance Pane of the Status view.

Insight URL

This value refers to the Insight URL, such as:

```
http(s)://<host>:<port>/
```

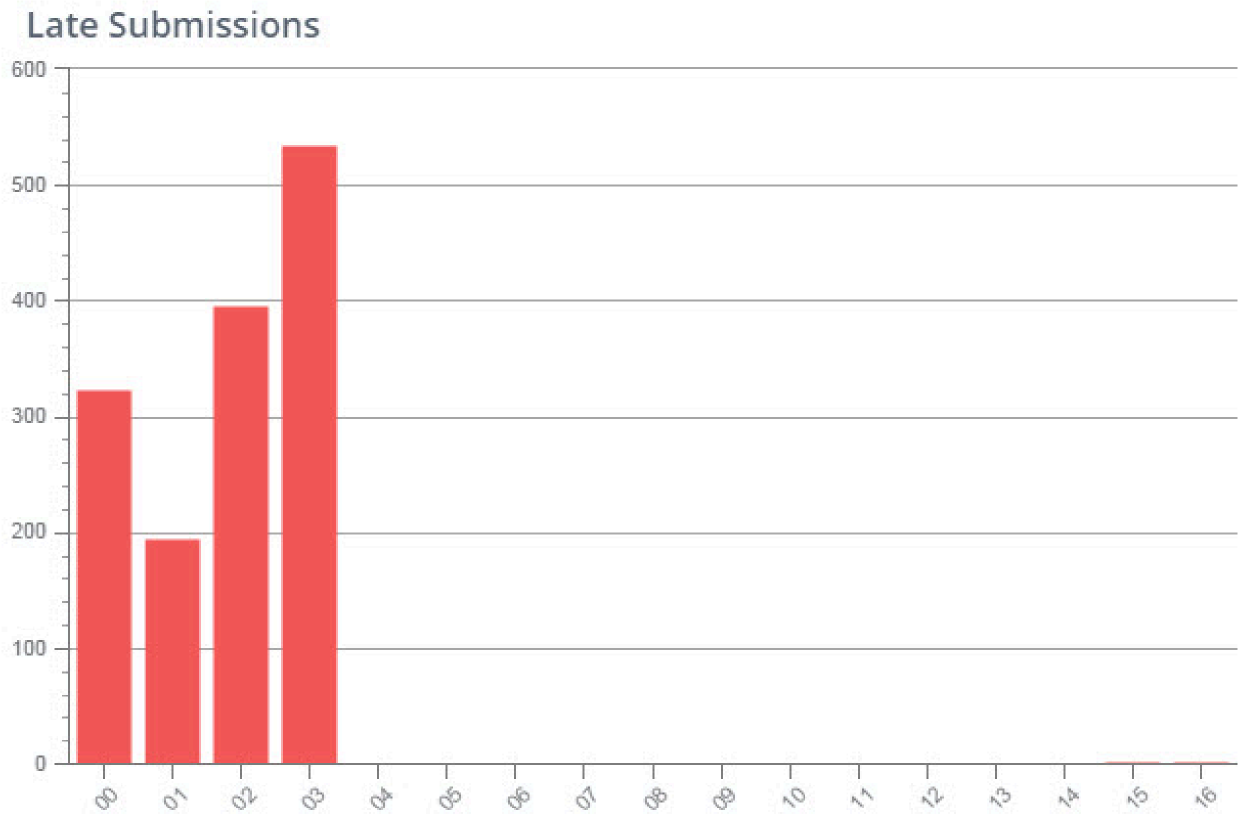
The default value is blank.

Late Submission (days)

The Late Submission (days) parameter defines the number of days between the invoice date and the invoice submission to the ERP system. The parameter is applied in the Payment Performance view. The default value is 7.

If the Late Submission (days) parameter is set to 7, and the discrepancy in the invoice actual creation date and the date of submission to the ERP system exceeds seven days, the Late Submissions bar chart in the

Payment Performance view displays the number of late invoices. The Late Submissions chart shows only paid invoices.



Mark Zero Invoice as Duplicate

With the Mark Zero Invoice as Duplicate parameter, you can enable the option to mark the invoices with zero amount as Potential Duplicates.

Values:

- ☐ (default): Invoices with zero amount are not considered as potential duplicates in the Potential Duplicates view.
- ☑: Invoices with zero amount are considered as potential duplicates and are included in the Potential Duplicates view.

MarkView base URL

The parameter defines the address to the MarkView HTTP/HTTPS base URL. The default value for the field is blank. To set the MarkView base URL parameter, enter the URL as follows:

```
http(s)://<server>:<port>/markview/
```

The MarkView base URL allows users to access invoice data in the MarkView system vie the MarkView viewer to manipulate captured images. The features available in the MarkView viewer depend on the user group to which the employee belongs.

Similar number length

"Similar number length" defines the number of the same initial characters for the compared invoice numbers expressed as percentage. The parameter is applied in the Potential Duplicates view.

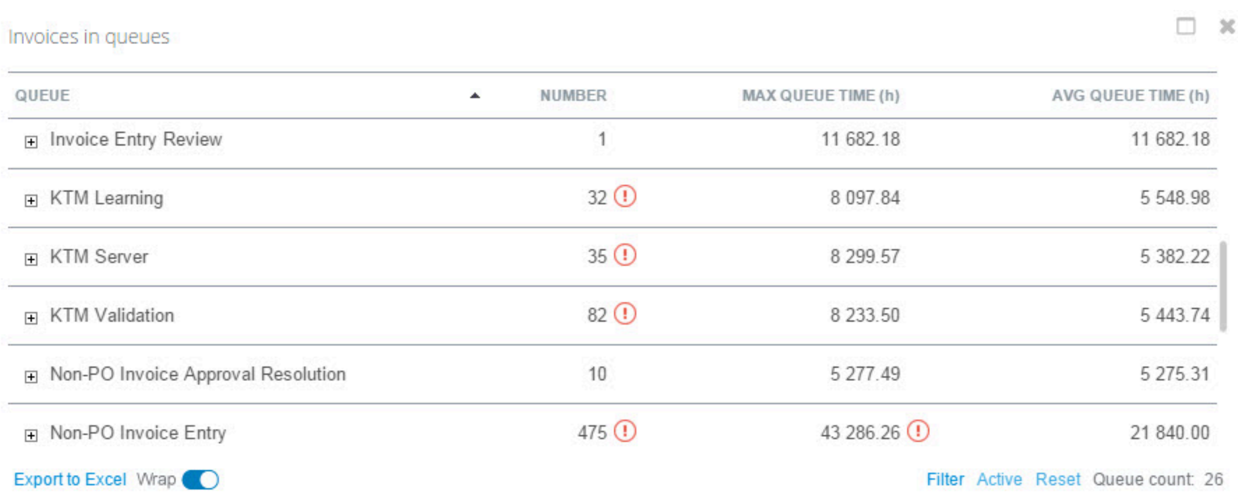
The default value is 0.80 or 80 percent.

If the numbers of two invoices with the same supplier and value within the same organization begin with at least 80 percent of the same characters, the invoice numbers are considered similar and the invoices become potential duplicates. The value is determined by a shorter invoice number.

Queue workload count threshold

The "Queue workload count threshold" parameter defines the number of invoices in queues with the assigned invoices. The parameter is applied in the Queues tab of the Status view. The default value is 10.

If NUMBER exceeds the configured value, the grid places an exclamation point (!) next to the queues. Expand the queues to view the list of users with invoices in queues.


Invoices in queues

QUEUE	NUMBER	MAX QUEUE TIME (h)	AVG QUEUE TIME (h)
Invoice Entry Review	1	11 682.18	11 682.18
KTM Learning	32 !	8 097.84	5 548.98
KTM Server	35 !	8 299.57	5 382.22
KTM Validation	82 !	8 233.50	5 443.74
Non-PO Invoice Approval Resolution	10	5 277.49	5 275.31
Non-PO Invoice Entry	475 !	43 286.26 !	21 840.00

Export to Excel Wrap Filter Active Reset Queue count: 26

Queue workload wait time threshold (min)

The "Queue workload wait time threshold (min)" parameter defines the information about queues with an overload. The parameter is applied in the Queues tab of the Status view. The default value is 120 minutes.

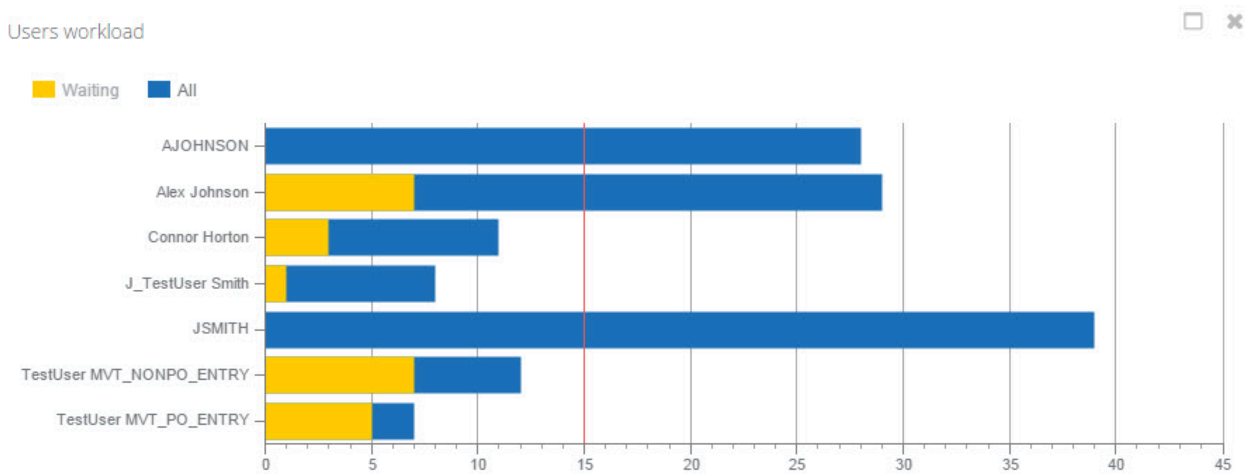
If MAX QUEUE TIME (h) exceeds the configured value, the grid places an exclamation point (!) next to the queues. Expand the queues to view the list of users with invoices in queues.

User workload count threshold

The "User workload count threshold" defines the maximum number of invoices that can be currently assigned to a user. The parameter is applied in the Status view. The default value is 10.

For example, if the "User workload count threshold" is set to 15, the users with the number of invoices exceeding 15 are displayed on the chart with the invoice bar going beyond the red line.

Note The "Users workload" chart displays all users that have at least one of the "User workload count threshold" and "User workload wait time threshold (min)" parameters with the exceeding threshold value.



User workload wait time threshold (min)

The "User workload wait time threshold (min)" defines the maximum waiting time related to invoice processing. The parameter is applied in the Status view. The default value is 120 minutes.

If a user has invoices exceeding the "User workload wait time threshold (min)," the "Users workload" chart displays the users with invoices in the waiting state.

Use Help Offline

With the Use Help Offline parameter, you can enable the access to the offline version of Help.

Values:

- ☐ (default): Help is available online only.
- ☑: Help is available offline (without an Internet connection).

Fields and Touches

Fields and Touches comprises tables for "Fields for statistics" and "MarkView touches."

Fields for statistics

Use the "Fields for statistics" screen to select fields to use for filtering data on the Fields Statistics and Quality Benchmark views. "Fields for statistics" also defines the fields considered as " KTM validation touch" in the Invoice Touches view.

The "Fields for statistics" screen displays the header and line values in the TABLE column.

The INCLUDE FOR NON-PO and INCLUDE FOR PO columns define fields to include in the Fields Statistics, Quality Benchmark, and Invoice Touches views.

Note The Pre-Approved type is included to the Non-PO value.

Before updating the list, scan and recognize the document with the corresponding fields.

When you update the selections on the "Fields for statistics" screen, they go into effect the next time that invoices are exported from Kofax Transformation to MarkView. Any previously processed data is unaffected.

Kofax Analytics for MarkView Administration provides the following default field values.

Header field type:

- Contact
- Currency
- Discount1
- InvoiceDate
- InvoiceNumber
- NetAmount0
- PurchaseOrderNumber
- SubTotal
- TaxAmount1
- TaxRate1
- Total
- VendorID
- VendorName
- VendorOrganisationID
- VendorSiteID

Line field type:

- Article Code
- Description
- Discount
- ItemTax
- ItemTaxAmount
- ItemTaxRate

- J. Code
- PO Line Item Number
- Purchase Order Number
- Quantity
- Total Price
- Unit Measure
- Unit of Quantity
- Unit Price

MarkView touches

The "MarkView touches" screen contains all MarkView queues for the supported workflows (Non-PO, PO, and Pre-Approved invoices).

The TOUCH column defines if any operator interaction within the specified MarkView queue is considered as a touch. If the invoice processing requires any operator interaction in the Coding, Comment Request, Entry, Resolution, or Review queue, the indicated actions within one queue are considered as one touch.

Kofax Analytics for MarkView Administration provides the following default touch types.

Coding:

- Approval and Coding
- Coding

Comment Request:

- Comment Request
- Pre-Approved Comment Resolution

Entry:

- Non-PO Invoice Entry
- PO Invoice Entry
- Pre-Approved Invoice Entry

Resolution:

- AP PO Invoice Process Resolution
- AP Resolution
- Non-PO Invoice Approval Resolution

Review:

- Freight Review Required
- Invoice Entry Review
- PO Invoice Review - Purchasing
- Recycle Bin Review
- Rescan Review
- Returned Invoice Review
- Review Required

- Tax Review Required

You can add or remove any value of the TOUCH column if you want to change the default settings. Use one of the five possible touch type listed earlier to mark any queue as a touch.

Dashboard Designer

The Dashboard Designer, a browser-based design tool used to create custom views, is available within Insight Studio. This tool offers many components to help you build an effective and comprehensive review of your Kofax Analytics for MarkView viewer system. Use the Dashboard Designer to:

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

> **Important** The views provided with Kofax Analytics for MarkView are based on values that come from predefined Kofax records and metrics. When designing custom views, do not modify the predefined views, records, or metrics that come with the product. Instead, copy a predefined view, save it with a different name, and then modify the components as necessary.
>
> If you modify built-in views, records, or metrics, the Kofax Analytics for MarkView Viewer behavior may change. To recover views, records, or metrics, reinstall the Kofax Analytics for MarkView Insight project.

To use Dashboard Designer, you must have the extended Insight licence that allows you to customize views, records, and metrics.

See the Kofax Insight online help for licensing information or contact Kofax Insight Sales Representatives.

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

Access Dashboard Designer

You access Dashboard Designer by starting Insight Studio.

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

     http(s)://<host>:<port>/Insight/Studio

   Be sure to verify that the website binding host name is set to blank or localhost in your IIS settings. Otherwise, a login error may occur.
2. Enter the login credentials for Insight Studio. Use the Insight Administration settings to define settings such as user passwords.

Add a new record or metric

Use this procedure to create a new, empty record or metric.

1. After starting Insight Studio, go to the **Guide** list and select item 2 or 3, **Create records** > **Add new record** or **Create metrics** > **Add new metric**.
   The new object window appears.
2. Assign a name to the new record or metric and click **OK**.
3. Use the record or metric editor to create the record or metric based on Kofax Analytics for MarkView records and metrics.
   For detailed information about working with the record or metric editor, see the Kofax Insight Studio online help.

Add a new view

Use this procedure to create a new, empty view.

1. After starting Insight Studio, go to the **Guide** list and select item 5, **Design dashboards** > **Add new view**.
   The New View Window appears.
2. Assign a name to the new view and click **OK**.
   The new view appears on the canvas.
3. Use the Dashboard Designer to design the view based on Kofax Analytics for MarkView records and metrics.
   For detailed information about working with Dashboard Designer, see the Kofax Insight Studio online help.

Copy an existing view

Use this procedure to add a view based on a view that already exists. This procedure is useful for creating views based on the predefined, built-in Kofax Analytics for MarkView views, which cannot be edited.

1. In Insight Studio, in the Documents Tree, click and expand **Views**.
2. Right-click the name of the view to copy, and then select **Copy**.
3. In the Documents Tree on the **Views** list, click the location where you want the new view to appear, and then right-click and select **Paste**.
   The new view with the "- copy" prefix is created and appears on the canvas.
4. Use the Dashboard Designer to update the newly created view.
   For detailed information about working with Dashboard Designer, see the Insight Studio online help.

Records and metrics

The predefined views provided with Kofax Analytics for MarkView are based on values that come from Kofax records and metrics described in this section. You can use the same records and metrics to create custom views.

When adding custom views, do not modify the predefined views, records, or metrics that come with the product. Instead, copy a predefined view, save it with a different name, and then modify the components as necessary.

Metrics are aggregations of records usually in the form of a count, sum, or average.

Records

Record	Description
All invoice history	Contains the history of all invoices from Kofax MarkView or Kofax Capture.
All invoices	Contains all invoices including all invoice fields from Kofax MarkView, Kofax Capture, or the ERP system.
Current invoices	Contains all invoices that are currently in Kofax MarkView, Kofax Capture, or the ERP system and are not yet processed.
Document field	Contains data for all document fields from Kofax Capture. Loads data for exported documents only.

Metrics

Metric	Description
Paid invoices	Estimates statistical data by all paid invoices.
Discount metrics	Estimates statistical data by missed and taken discounts for all invoices.
User productivity	Estimates user productivity within different actions.
Extraction statistics	Estimates basic statistical data by extracted fields.

Share your dashboard views with the public

Each component or view has a unique URL address. You can share the URL with external parties.

To retrieve the URL for a component, right-click the component and select **Get link**.

To retrieve the URL of a view, right-click the name of the view listed in the Documents Tree and select **Get link**.

Views have two URL addresses, as follows:

- URL with an Open In Viewer button: Use this URL to display a View in a new browser window.
- URL to the SharePoint address with a Copy button: Use this URL to distribute to others using SharePoint.

Note Accessing a View directly via a URL does not bypass security. Users are authenticated as if they accessed the view via the standard URL for the Insight Viewer.

Chapter 6

Use Kofax Analytics for MarkView

This chapter describes how to use Kofax Analytics for MarkView and the views it offers.

Kofax Analytics for MarkView viewer and Invoice actions

With Kofax Analytics for MarkView, you can collect analytics data and then display the data in an interactive dashboard.

The dashboard presents your business activities using graphs and charts. Views provide summary information about a selected process and invoices related to that process.

Kofax Analytics for MarkView viewer

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

While working with Kofax Analytics for MarkView views, you can perform the following operations.

- Click any invoice in grids to drill down to the invoice summary details.
- Double-click a table line to zoom on a window header.
- Manipulate and interact with any component on the dashboard to view the corresponding invoice list with full history.
- Hover over a chart element such as a bar in a bar chart, or a segment in a pie chart to view details.
- Filter the results by clicking **Filter** at the bottom of the page and specifying filtering parameters.

The data for each view in Kofax Analytics for MarkView viewer is refreshed automatically at regular five-minute intervals.

Open Kofax Analytics for MarkView viewer

Kofax Analytics for MarkView requires that users be assigned to the Analytics user group in MarkView. The Analytics user group gives members access to the Kofax Analytics for MarkView views. Kofax Analytics for MarkView users can review the data by organizations that are defined in MarkView and Oracle EBS.

To open the Kofax Analytics for MarkView viewer, follow the procedure in this section.

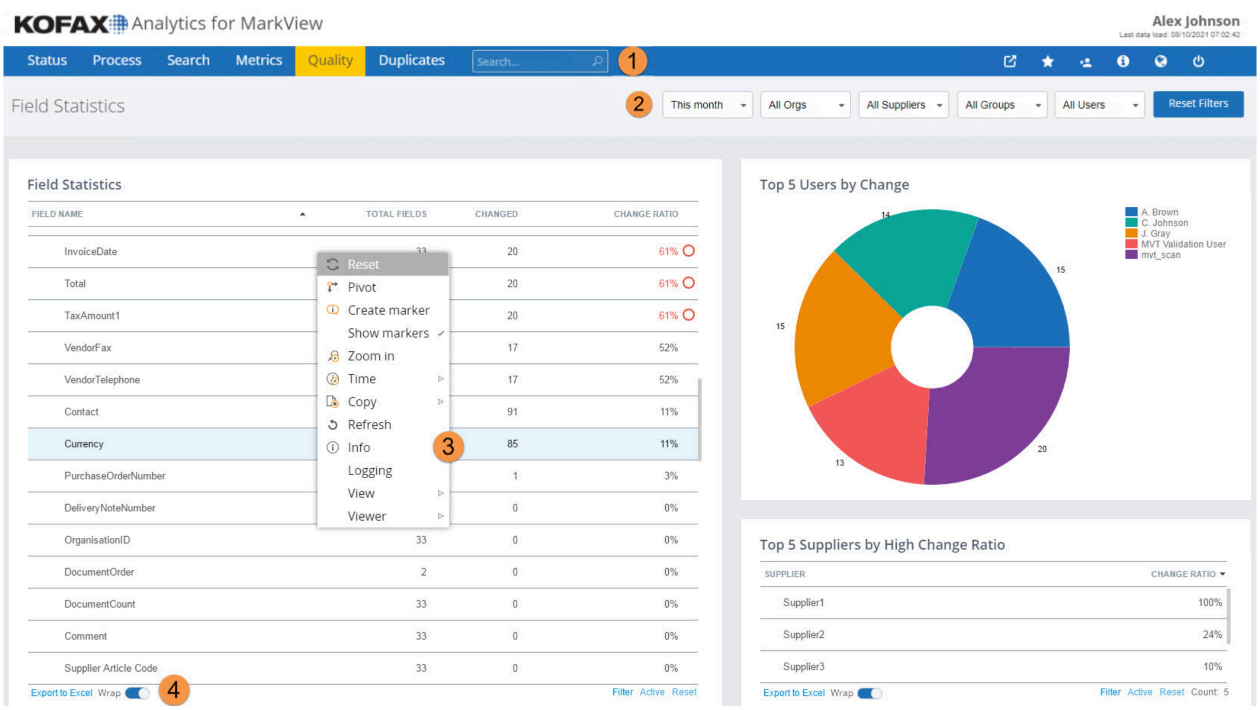
1. Open a web browser and enter the URL such as `http(s)://<host>:<port>/Insight/View` where `<host>` is the name of the server where you installed Insight and `<port>` is the port used by Insight.
   A login window appears.
2. Enter valid login credentials and click **Login**.

Kofax Analytics for MarkView viewer screen layout and navigation

At the top of the page, the Kofax Analytics for MarkView header is displayed. This header is available on all pages throughout the system. You cannot interact with the header area.

The Kofax Analytics for MarkView header displays:

- The Kofax logo and the Kofax Analytics for MarkView product name
- User name
- The date and time until which your current (ongoing) data was successfully loaded



Kofax Analytics for MarkView viewer

1	**Toolbar menu**: Use the menu to access views and administrator features, including Status, Process, Search, Metrics, Quality, Duplicates, and Administration. Use additional user-level items to bookmark frequently used views, study version information, and log out. Use the Help tab to access help for the current view. The Export tab lets you set preferences to export the content of the view to Microsoft Excel or Adobe Acrobat Reader.

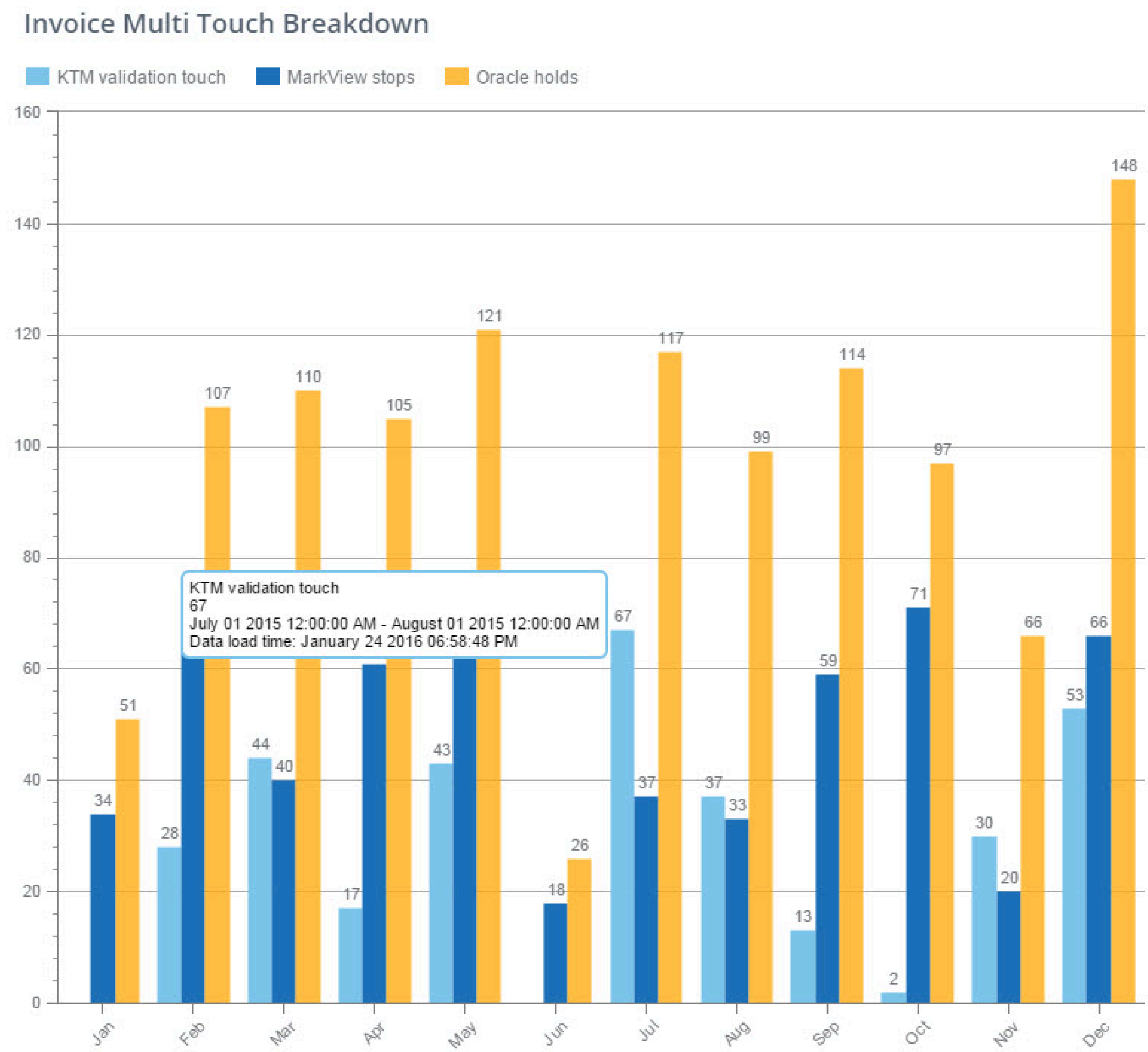
2	**Filter pane**: Use the pane that appears under the toolbar menu to select customizable options such as organizations, suppliers, invoice types, currency, and time range. Use the Reset Filters option to return the data selection to the default settings. The pane may include view-specific information such as invoice summary data.
3	**Context menus and chart options**: Right-click a chart or grid to access more options such as Reset, Pivot, Zoom in, View, and the Metric grid format. The options vary, based on the chart type or area where you right-click.
4	**Chart and grid footers**: Additional options are available on some charts and grids. Features may include filter and reset options, Export to Excel, or text wrap settings. Footers may also include chart or grid specific summary data such as total amount.

View features

Views provide summary information about a selected process, details about invoices within that process, and options to act upon invoices.

Kofax Analytics for MarkView views provide a high-level image of the current and historic data as filtered through established settings, such as a date range or organization. The type of graph or chart that appears varies among views and depends on the type of information being shown.

Holding the cursor over an area of a view graph or bar displays additional information about that segment.

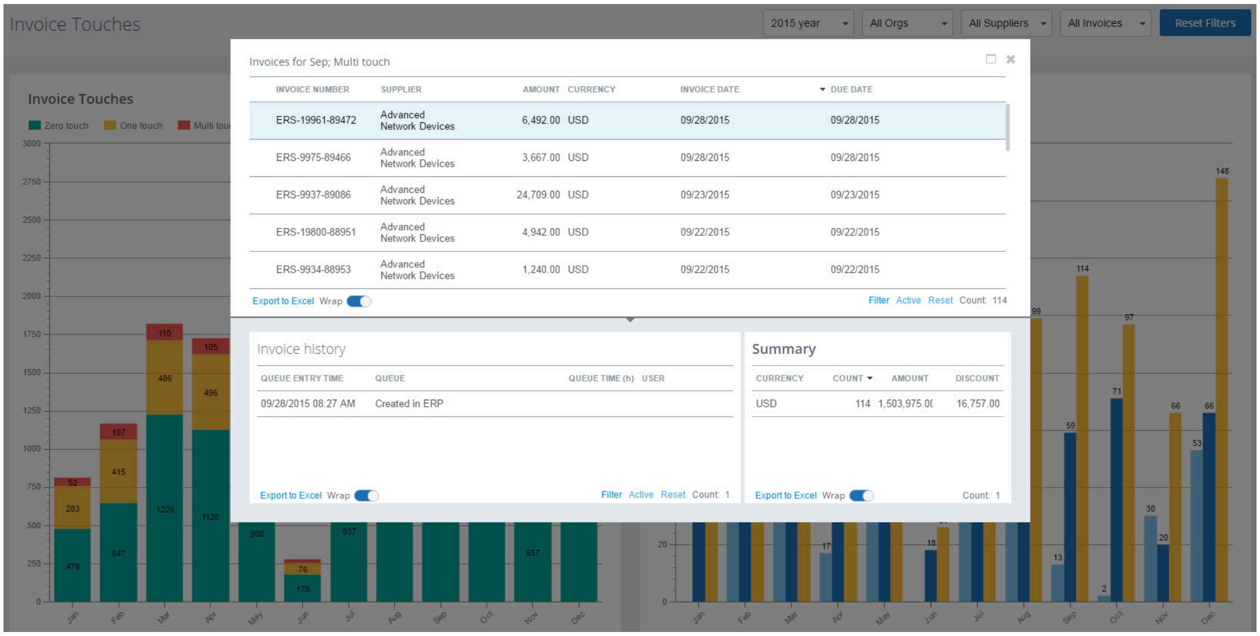


Invoice details table

Click a chart bar or graph to view an invoice details table that includes the invoice number, supplier, amount with the currency, invoice date, due date, queue, and owner with the invoice history and summary.

If you apply any filter on the main view screen, the window displays information according to the filter applied.

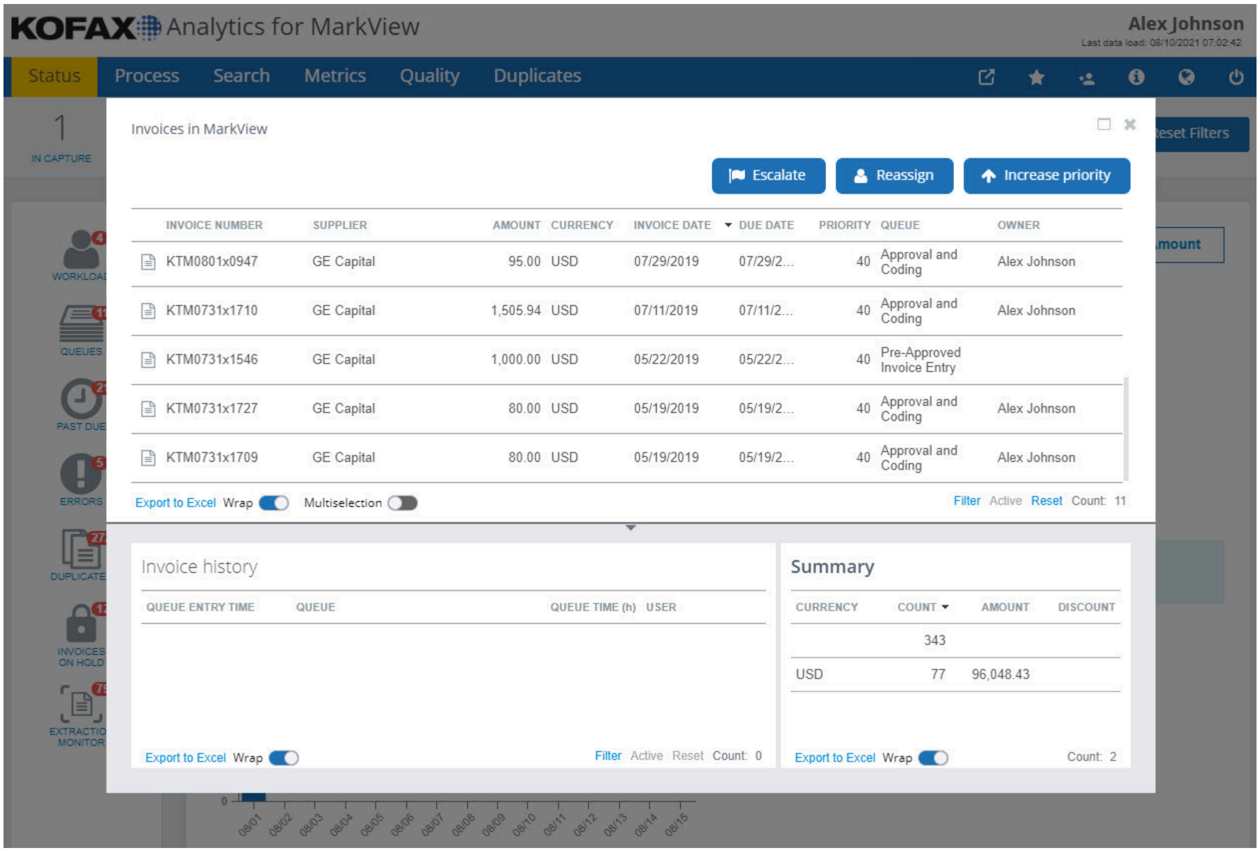
The Invoices list shows invoices according to the selected Analytics component. For example, on the Invoice Multi Touch Breakdown view, click the KTM Validation touch bar for March 01 2015 - April 01 2015 to view the invoice list shown in the figure.



Click a table row to view the invoice history, which includes the list of queues and queue time in Kofax Capture with Kofax Transformation Modules and MarkView. If an invoice is created directly in Oracle EBS, the Invoice history queue column contains a "Created in ERP" note.

The invoice history list displays the following columns in pop-up windows for all Kofax Analytics for MarkView views:

- Queue Entry Time: Specifies the date the invoice enters the corresponding queue.
- Queue: Specifies the name of the invoice current queue.
- Queue Time (h): Specifies the total time the invoice spent in the corresponding queue. The column is blank for invoices that have not left the queue yet and are currently in the queue.
- User: Specifies the user that performs invoice processing in the corresponding queue.



Click the header of the column to sort the list by a specific column. If you want to reset the results of sorting for the Invoice history table, right-click the table and select **Reset** or reopen the invoice details table.

The invoice list displays columns in pop-up windows for all Kofax Analytics for MarkView views. Columns vary depending on the view selected:

- Amount
- Currency
- Discount Amount
- Due Date: In Status, the PAST DUE element pop-up window displays "Overdue (d)" instead.
- Entry Date
- Error
- Export Date
- Invoice Date: Sorted by default.
- Invoice Number
- Late (d)
- Match
- Missed Discount
- Overdue (d)

- Owner
- Payment Date
- Priority
- Queue
- Queue Time (h)
- Supplier
- Taken Discount

Click the **Open in MarkView Viewer** icon to review an invoice in MarkView Viewer to see the captured image of an invoice and perform the needed processing through MarkView. The **Out of date** icon notifies you if any action was taken on invoices. The **Out of date** icon remains until the next data load. In the Chart and Grid Footers area, use the **Multiselection** option to take an action on multiple invoices.

The invoice details table contains the **Summary** list with the following information.

- Currency
- Count
- Amount
- Discount Amount

In Status, the **Summary** list shows the total available discount.

In Process, the **Summary** list shows the total available discount for paid and deleted invoices and the total discount taken value for unprocessed invoices.

You may use Export to Excel in the grid footers for all lists in the invoice details table to export the content of the view to Microsoft Excel.

The filter options enable you to narrow your results:

- Filter: Specifies additional criteria based on available view columns.
- Active: Returns filter results to the data selection defined by the Filter option.
- Reset: Clears filter results and returns the data selection to the default settings.

The text wrap option changes the grid layout. Enable the option to apply a line break. Disable the option to display the data inline.

Export to Excel

On any grid with Export to Excel functionality, you can export the content of the grid to Microsoft Excel. Kofax Analytics for MarkView automatically exports the content of the grid.

If you use the **Export** > **Excel** functionality in the toolbar menu, set preferences for exporting the content of the view to Microsoft Excel:

1. On the **Export** tab, select **Excel**.
   The **Export to Excel** window appears.

2. In the **Export content** section, select **"All pages of grid, top drill down level. Could take some time."**

   In the **Supplier Performance** view, you can select any **Export content** option depending on your requirements. For more information, see Supplier performance.

   > **Note** Kofax Analytics for MarkView does not support the **Export to Excel** option for the Process view.

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 file.

> **Note** If you hide any data in a chart and export the view to Excel, the Export to Excel function generates a file with all hidden data.

Export to PDF file format

Use the **Export** > **PDF** functionality in the toolbar menu to set preferences for exporting the content of the grid to the PDF file format.

1. On the toolbar menu, click **Export** and select **Export to PDF**.

   The **Report options** window appears.

   > **Note** Kofax Analytics for MarkView does not support the **Export to PDF** option for the Process view.

2. From the list, select the required page size.
3. Select an **Orientation** option:
   - **Portrait**
   - **Landscape**
4. Set **Margins (inches)** and click **OK**.

> **Note** If you hide any data in a chart and export the view to the PDF file format, the Export to PDF function generates a PDF file with all hidden data.

Bookmarks

With Kofax Analytics for MarkView, you can bookmark frequently used views.

1. Open the view to bookmark and click the **Bookmarks** tab.
2. Enter the bookmark name and click **OK**.
3. Use the provided options to edit or delete a bookmark, send a bookmark via email, and add a bookmark to a browser.

4. Select a bookmark from the list and click .

   In the **" Bookmark visibility"** window, set the bookmark visibility option:

   - Public: Select this option to share your view data with all users that have access to Kofax Analytics for MarkView.
   - Personal: Select this option to make the view data private to you.

5. Click **Open bookmark in new window** to view the bookmark.

Invoice actions

With Kofax Analytics for MarkView, authorized users can select invoices and click a button to take an action on a selected invoice:

- Escalate: Moves an invoice retrieved but not yet processed by a user to a supervisor in the Approval Hierarchy.
- Reassign: Assigns an invoice to another MarkView user who has authorization to retrieve the invoice.
- Increase priority: Increases the priority of an invoice by 10 points.

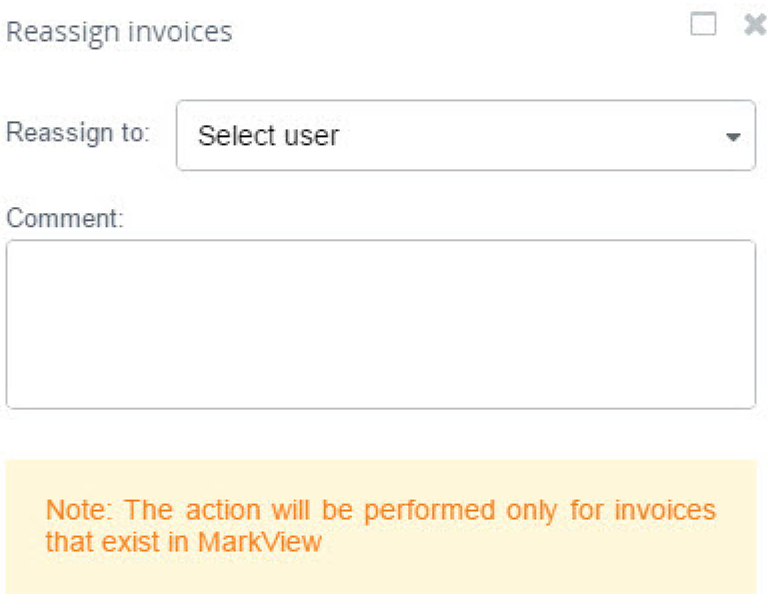
Invoice actions are available for Kofax Analytics for MarkView Process and Search views, and the following Status view components:

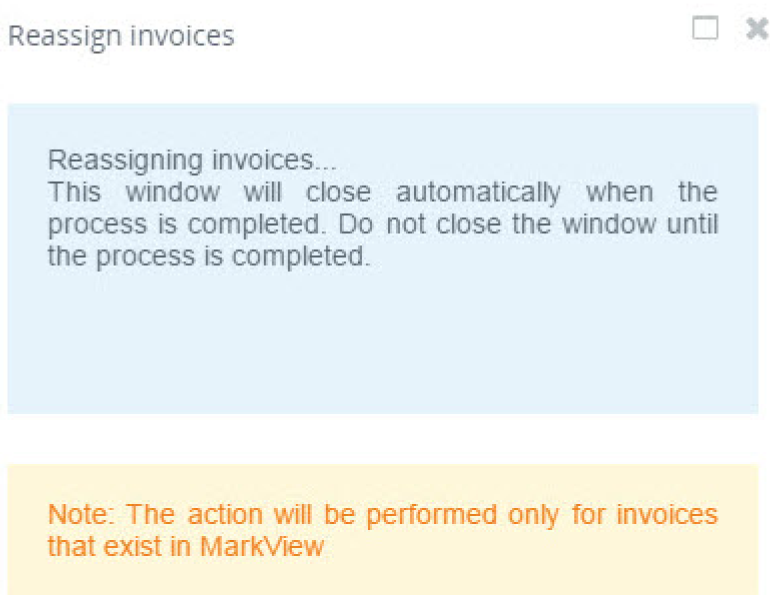
- Invoices Coming Due chart
- Discounts Coming Due chart
- System Performance Pane: Workload icon
- System Performance Pane: Queues icon
- System Performance Pane: Past Due icon
- System Performance Pane: Invoices on hold icon
- Filter Pane: Invoices in MarkView

Click individual chart bars or icons to open the invoice details window with the invoice history. Use single or multiple selection to take actions on the invoices.

Note To enable the action buttons, select invoices from the list. The action buttons are available after selection of any invoice, regardless of the invoice type or queue. For example, if you set an action to an invoice that is currently in Kofax Capture, the action does not occur and the invoice state does not change.

Click **Escalate**, **Reassign**, or **Increase priority** to act on all invoices selected in the details table. If a user is not authorized to perform a particular action, the associated action button is disabled for this user. Clicking an action button opens a window where you can start the selected action, similar to the following figure. Click **OK** to initiate the action.





After the action is finished, the dialog box is closed and the invoice list is refreshed.

The **Out of date** icon next to the Invoice Number column indicates the invoice state in all the **Status** view lists for all users.

Invoice updating may take some time. The update procedure does not remove the **Out of date** icon. The invoice state updates after the next scheduled data load.

Escalate

Escalate lets you move an invoice requiring attention from the user who retrieved it to the next person who is set up in the MarkView Approval Hierarchy for invoice processing.

Note To use the Escalate action, your site must have hierarchies set up in MarkView or ERP, and all users must be assigned within the hierarchy.

You can escalate a MarkView invoice under the following conditions:

- The user has a supervisor defined in the MarkView hierarchy or, for an ERP site, in the ERP hierarchy.

  If the user does not have a supervisor defined in the MarkView hierarchy, or the supervisor is not a MarkView user, you cannot escalate the invoice. (In this case, you might use the Reassign function instead.)
- The supervisor has permission to retrieve the work item.

For example, using Kofax Analytics for MarkView, you might escalate an invoice to a user’s supervisor. The escalation sends email to notify both users of the change in assignment.

Under the following circumstances, Kofax Analytics for MarkView generates error messages and stops the escalation for the invoices that fail:

- If the manager, next person in the hierarchy, or assigned alternate user does not have authorization to process the invoice.
- If Kofax Analytics for MarkView cannot determine who holds the next highest position in the MarkView or ERP hierarchy.

Reassign

Reassign lets you assign an invoice to a different user who has the correct authorization set up in MarkView. You can reassign any MarkView invoice in any workflow queue. The system sends an email to notify both users of the change. The invoice appears as a high-priority item at the top of the list of invoices for the newly assigned user to retrieve.

You cannot reassign an invoice if no other MarkView user has authorization to retrieve the invoice.

Use Reassign to manage resources and schedules by shifting assignments between users.

Increase priority

Increase priority lets you increase the priority of any invoice that has an associated MarkView document by 10 points. If a user already retrieved the invoice, the system sends an email to notify the user of the increased priority. The invoice moves to the correct place in the priority of invoices listed for processing. (MarkView places invoices with the highest priority at the top of the list.)

Increase priority lets you communicate through MarkView without interrupting the user who may be processing the invoice in question.

Kofax Analytics for MarkView views

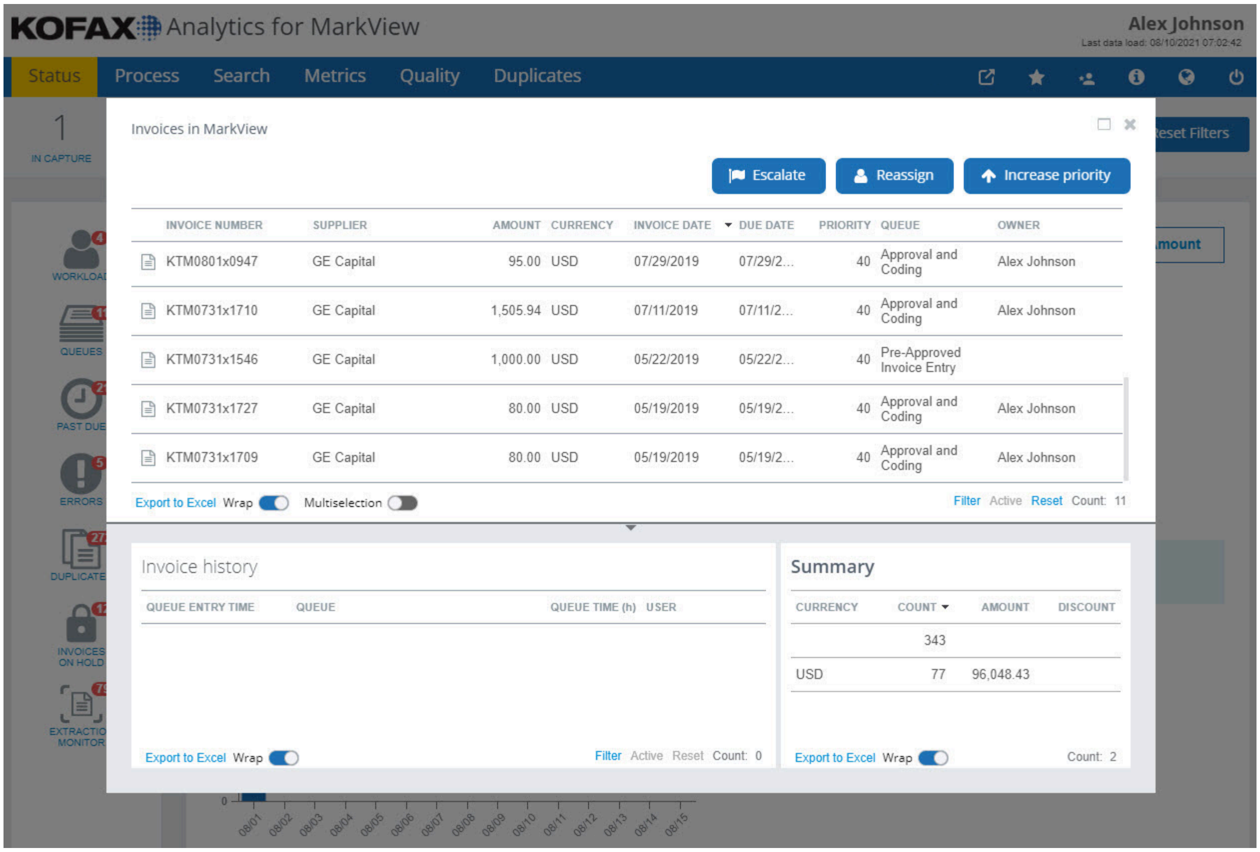
This chapter gives information about each view provided in your Kofax Analytics for MarkView installation.

- Status
- Process: Diagram and Paths
- Search: Basic search and GL Account Search
- Metrics:
  - Invoices and Discounts
  - Hold
  - Spend
  - Invoice Touches
  - Payment Performance
  - Supplier Performance
  - Volume Usage
  - Operator performance - Capture
  - Operator performance - MarkView
- Quality:
  - Line Matching
  - Field Statistics
  - Quality Benchmark
- Potential Duplicates

Status

The Status view displays actual data about current invoice processing through the workflow. By default, an operator sees the Status view immediately after logon.

The Status data is based on the overall operations performance. The Status view displays information about unprocessed invoices only. Status does not display invoices that are in MarkView end-state queues. Use the Status view to analyze actual invoice data, manage invoices to suit business interests, and take advantage of available discounts.



Filter pane elements

On the filter pane, a count is given for the number of invoices in Kofax Capture, in MarkView, in the ERP system, and invoices that are ready for payment. Click the value of the count to view the expanded set of invoice details such as the invoice number, supplier, amount with the currency, invoice data, due date, queue, and user. You can select an invoice from the list to view the invoice history with the queue and user details in the bottom grid.

- **In Capture**: Displays a count for the number of invoices currently in the Kofax Capture system. Click **IN CAPTURE** to view invoice details such as the invoice number, supplier, amount with the currency, invoice date, and queue. Click the header of the column to sort the list by a specific column. The **Invoices in Capture** window also shows the invoice history with the queue and user details in the bottom grid.
- **In MarkView**: Displays a count for the number of invoices currently in the MarkView system that are not ready for payment. Click **IN MARKVIEW** to view invoice details such as the invoice number, supplier,

amount with the currency, invoice date, due date, queue, owner, and priority. Click the header of the column to sort the list by a specific column.

Click the **Open in MarkView Viewer** icon to review an invoice in MarkView Viewer that lets employees see the captured image of an invoice and perform the needed processing through MarkView.

The **Out of date** icon notifies you if any action was taken on invoices. The "Out of date" icon remains until the next data load.

The **Invoices in MarkView** window also shows the invoice history with the queue and user details in the bottom grid.

Use the invoice action buttons to take actions on invoices.

- **In ERP**: Displays a count for the number of invoices created in Oracle E-Business Suite that are not processed and not ready for payment yet.

  Click **IN ERP** to view invoice details such as the invoice number, supplier, amount with the currency, invoice date, and due date. Click the header of the column to sort the list by a specific column.
- **For Payment**: Displays a count for the number of invoices that are ready for payment. Click **FOR PAYMENT** to view invoice details such as the invoice number, supplier, amount with the currency, invoice date, and due date. Click the header of the column to sort the list by a specific column.

  Click the **Open in MarkView Viewer** icon to review an invoice in MarkView Viewer.

  The **Invoices for payment** window also shows the invoice history with the queue and user details in the bottom grid.

If an invoice exists for one of the elements in the filter pane but does not have an invoice number, the corresponding column displays the N/A value.

Kofax Analytics for MarkView supports the following document types and work item classes:

- For Kofax Capture: PO Invoice, Non-PO Invoice, and Pre-Approved document types.
- For MarkView: PO Invoice, Non-PO Invoice, and Pre-Approved work item classes.

System Performance pane elements

The System Performance pane includes elements for the main operation areas. If the area requires attention, the element is marked with a red tag.

	Displays the information about users with invoices that are currently assigned to them. You can filter users by groups or an individual user. The red tag shows the number of workload users that have: • An overload of assigned invoices that exceed the User Workload Count Threshold parameter. • Invoices exceeding the User Workload Wait Time Threshold (min) parameter. Click the **Workload** icon to review the workload bar chart. Click a bar to display the invoice details table with the following data:. • The **Out of date** icon. Available until the next data load. • The **Open in MarkView Viewer** icon. Available for invoices entered in MarkView. • Invoice number • Supplier • Amount • Currency • Invoice date • Due date • Priority • Queue. Displays the current queue in the workflow. • Queue time (h). If an invoice waiting time exceeds the User Workload Wait Time Threshold parameter, the warning icon is displayed. By default, the order is descending. • Owner. Displays the current owner. Select invoices and click an invoice action button to take action on the invoice.

	Displays the information about queues with an overload. The red tag shows the number of queues: • With the assigned invoices exceeding the Queue Workload Count Threshold. • With the invoices exceeding the Queue Workload Wait Time Threshold (min). Click the **Queues** icon to review the queues list. Click a line to display the invoice details table with the following data:. • The **Out of date** icon. Available until the next data load. • The **Open in MarkView Viewer** icon. Available for invoices entered in MarkView. • Invoice number • Supplier • Amount • Currency • Invoice date • Due date • Priority • Queue • Queue time (h). If an invoice waiting time exceeds the Queue Workload Wait Time Threshold parameter, the warning icon is displayed. By default, the order is descending. • Owner. Displays the current owner. Select invoices and click an invoice action button to take action on the invoice. Two filter options are available for **Invoices in queues** window: • **Show history**: Shows the invoice history for the selected invoices. This is the filter default value. • **Hide history**: Hides the invoice history for the selected invoices to speed up bulk data loading.
	Displays how many invoices are past due. The red tag shows the number of invoices that are not paid by the due date. Click the **Past due** icon to display the invoice details table with the following data:. • The **Out of date** icon. Available until the next data load. • The **Open in MarkView Viewer** icon. Available for invoices entered in MarkView. • Invoice number • Supplier • Amount • Discount • Currency • Invoice date • Priority • Overdue in days. By default, the order is descending. • Queue. Displays the current queue in the workflow. • Owner. Displays the current owner. Select invoices and click an invoice action button to take action on the invoice.

 ERRORS	Displays the quantity of invoices that are currently in the system in an error state. Also shows invoices that failed to import to Oracle EBS. The "Invoices with error" table displays such invoices in the Interface Processing Error queue. The red tag shows the total number of invoices with errors. Click the **Errors** icon to display the invoice details table with the following data: • The **Open in MarkView Viewer** icon. Available for invoices entered in MarkView. • Invoice number • Supplier • Amount • Currency • Invoice date • Due date • Queue. Displays the current queue in the workflow. • Error message
 DUPLICATES	The red tag shows the number of invoices that are currently considered potential duplicates. Click the **Duplicates** icon to open the view.
 INVOICES ON HOLD	Displays the invoices on hold by quantity/amount and by type of hold. Click the **Invoices on hold** icon to open the view. The red tag shows the total number of invoices on hold.
 EXTRACTION MONITOR	The red tag shows the percentage of invoice fields that were successfully extracted and are without user modification. The percentage is displayed if the value for the monitoring interval is less than the Correct and Valid Level Threshold. Click the **Extraction Monitor** icon to open the Quality Benchmark view.

Status charts

Use the following charts to track the invoices and discounts coming due within a set time interval. Use the filter at the top to configure the time period, payment method, currency, and type of invoice for both charts.

- **Invoices coming due**: Displays the quantity or the currency amount of invoices coming due within the specified filter value.

  The invoices total quantity and amount are displayed on top of the chart.

  Click a bar on the "Invoices coming due" chart to view invoice details in a separate window.

  Use the invoice action buttons to take action on the invoice.
- **Discounts coming due**: Displays the quantity or the currency amount of all discounts coming due within the specified filter value.

  The invoices total quantity and amount are displayed on top of the chart.

  Click a bar on the "Discounts coming due" chart to view invoice details in a separate window.

  Use the invoice action buttons to take action on the invoice.

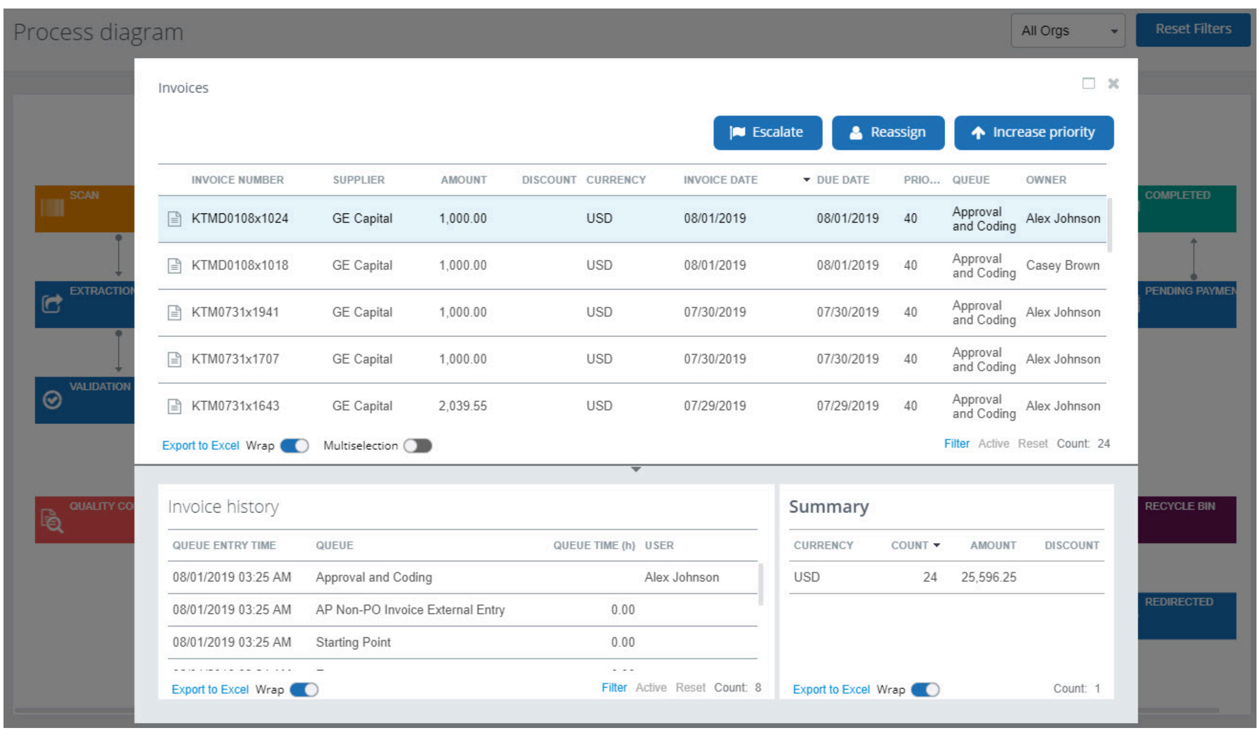
Process

Use this view to analyze the Kofax Capture and MarkView conventional workflow in real time. Identify invoice processing bottlenecks and take action to clear them. View the processing statistics to address issues that impact productivity.

Diagram

The view represents a simplified block diagram of the Kofax Capture and MarkView conventional workflow.

The numeric value on each block shows the number of invoices that are currently on the corresponding processing stage. When selecting an individual component of the process diagram, you can view an invoice summary that offers an expanded set of detailed information such as the invoice number, supplier, amount, currency, invoice date, due date, and the queue. You can also click a row in a table to view the invoice history. The history includes a list of queues where the selected invoice has been processed, along with the queue time. Use the invoice action to take action on the invoice.



Component	Description
SCAN	Starting point for invoice processing in the process diagram. May display invoices that the Kofax Transformation Modules operator redirects to SCAN and invoices awaiting scanning.

Component	Description
EXTRACTION	Kofax Transformation Server module. Displays the information about invoices that are ready for field recognition and extraction in the Kofax Capture system.
VALIDATION	Kofax Transformation Validation module. Displays the information about invoices awaiting processing in the Validation module or already opened in Validation, but not yet released.
EXPORT	Export module. Displays invoices in the Kofax Capture system that are ready for export to MarkView.
QUALITY CONTROL	Quality Control module. Displays information about invoices moved to the Quality Control module in the Kofax Capture system. Documents with errors also appear in this module.
DELETED IN CAPTURE	Deleted documents. Displays invoices for the current day if an invoice is deleted from a batch but the batch for the current day is not deleted. If you delete a batch, DELETED IN CAPTURE displays the batch invoices within the configured timeout value. The default value is 15 days. See Timeout setting for batch deletion (optional).
IMPORT	Invoices are successfully exported from Kofax Capture but are not yet imported as AP Invoice work items in MarkView.
ENTRY	Invoice Entry is a combination of the Entry queues for PO, Non-PO and Pre-Approved invoices in the MarkView system. The Invoice Entry component includes: • Non-PO Invoice Entry • PO Invoice Entry • Pre-Approved Invoice Entry • AP Non-PO Invoice External Entry • AP PO Invoice External Entry • AP Pre-Approved Invoice External Entry **Note** The Invoice Entry component is a starting point for invoices that proceed to MarkView from different sources. The step may also include non-Capture invoices.
APPROVAL & CODING	Displays invoices awaiting coding and approval in the MarkView system. The Approval & Coding component includes: • Approval • Approval & Coding • Coding
COMMENT REQUEST	Displays the information about invoices in the Comment Request queue in the MarkView workflow.

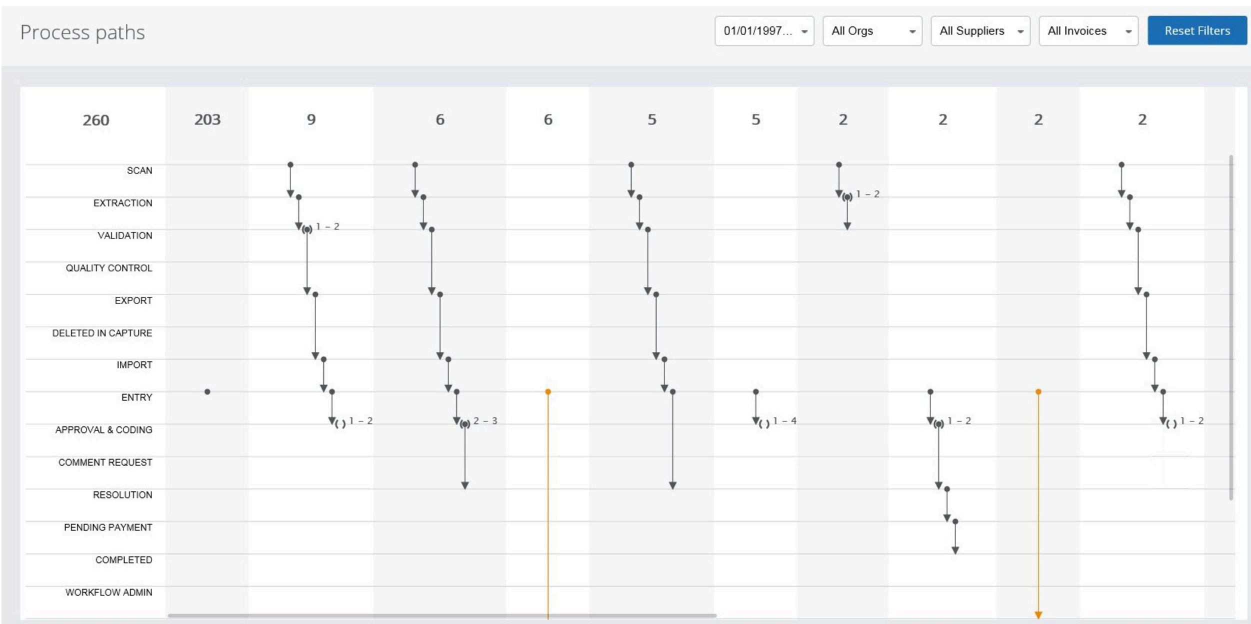
Component	Description
RESOLUTION	Represents process resolutions or verification that the Accounts Payable process is complete. The Resolution component includes data from the following MarkView queues: • AP PO Invoice Process Resolution • AP Resolution • 170 Verification Process for PO Invoices • Matching Error Resolution • Non-PO Invoice Approval Resolution • Pre-Approved Comment Resolution • Purchasing Resolution • Receiving Resolution • Verify AP Process Complete • Awaiting Follow-Up • Freight Review Required • Invoice Entry Review • PO Invoice Review - Purchasing • QA Required • Review Entity • Review Required • Senior Financial Audit • Tax Review Required • Rescan Review • Returned Invoice Review • Recycle Bin Review • Supplier Maintenance
PENDING PAYMENT	Displays the information about invoices awaiting payment.
COMPLETED	Displays the information about invoices successfully paid in the ERP system and moved to the Completed or Archive queue in the MarkView workflow. The block shows the data only for the current day.
WORKFLOW ADMIN	Displays the information about invoices that cannot be processed and moved to the Interface Processing Error queue because an error occurred. The component is also used to view the work items in the Workflow Administration queue from the connector.
CANCELLED	Displays the information about cancelled invoices for the current day. The component is also used to view the work items in the External Processing Terminated queue.
RECYCLE BIN	Provides the information about invoices moved to the recycle bin in MarkView for the current day.
RESCAN	Provides the information about rescanned invoices for the current day.
RETURNED	Provides the information about invoices returned in MarkView for the current day.
REDIRECTED	Provides the information about invoices redirected in MarkView for the current day.

Paths

The Process paths view shows the invoice processing workflow in Kofax Capture and MarkView, which is presented as a swim lane flowchart.

Horizontal lines divide the chart into Kofax Capture and MarkView workflow processing stages. See a more detailed description for processing stages in Diagram.

Each vertical line displays a unique path of an invoice. The numeric value for a vertical line displays the number of invoices that are processed through the corresponding path. When selecting an individual component of the swim lane flowchart, you can view the invoices list and history details that offer an expanded set of information such as the invoice number, supplier, amount, currency, invoice date, due date, current queue or module, and the user. You can also click a row in a table to view the invoice history. The history includes a list of queues where the selected invoice has been processed, along with the queue time. Use the invoice action to take action on the invoice.



The color of an arrow defines if a work item moves through the workflow correctly.

- Gray: Correct transition from a work item to the next queue in the workflow.
- Orange: Partially correct transition from a work item to the next queue in the workflow. The process corresponds to the scheme but some steps are missing.
- Red: Incorrect transition.

Additionally, the **Process paths** view displays multiple and consecutive transitions through the same queue. Parenthesis and numeric characters show the minimum and the maximum values of the transitions through the queue. Click the workflow to open the Invoice details table to check the number of transitions for the selected invoice in the Invoice History table.

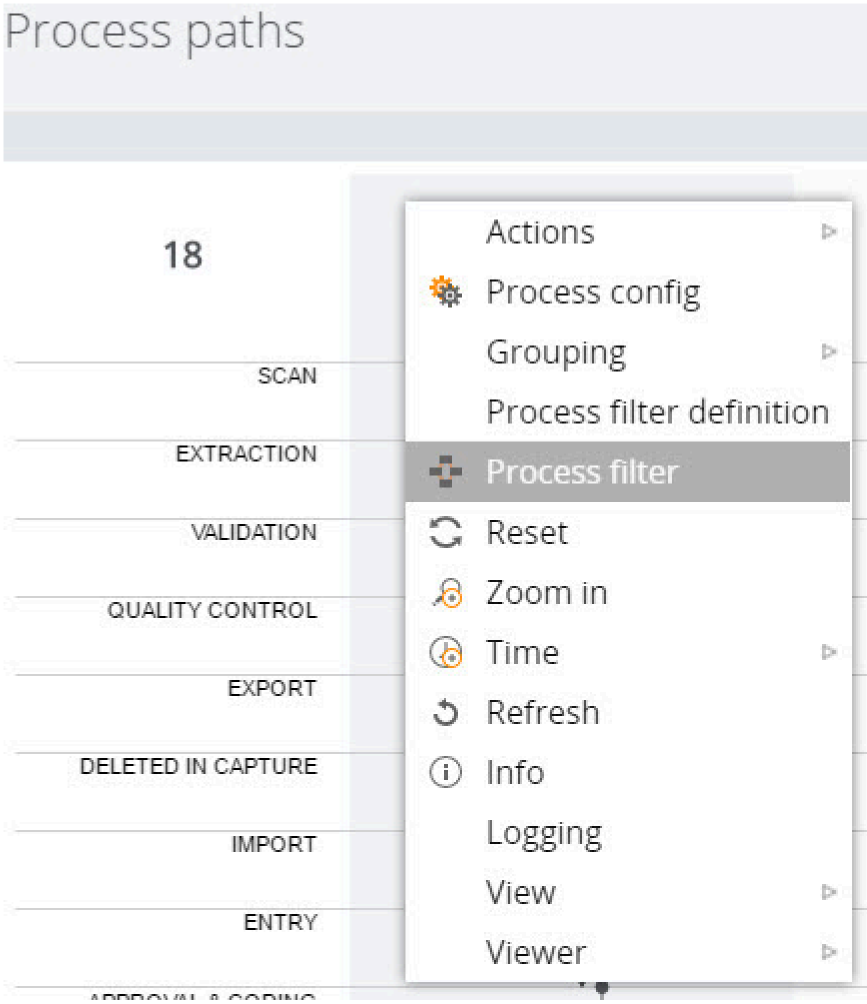
The view filter pane enables displaying the data by the following criteria:

- **Select period**: Set one of the following time interval values.
  - This month: Data for the present calendar month from the first day to the current date. Selected by default.
  - Last month: Data for the previous calendar month.
  - This year: Data for the current fiscal year from the first day to the current date.
  - Custom: Data for the configured period of time. A calendar is provided.
- **All Orgs**: The filter default value is All Orgs. Filters information by organization.
- **All Suppliers**: The filter default value is All Suppliers.
- **All Invoices**: The filter default value is All Invoices. Filters information by invoice type.

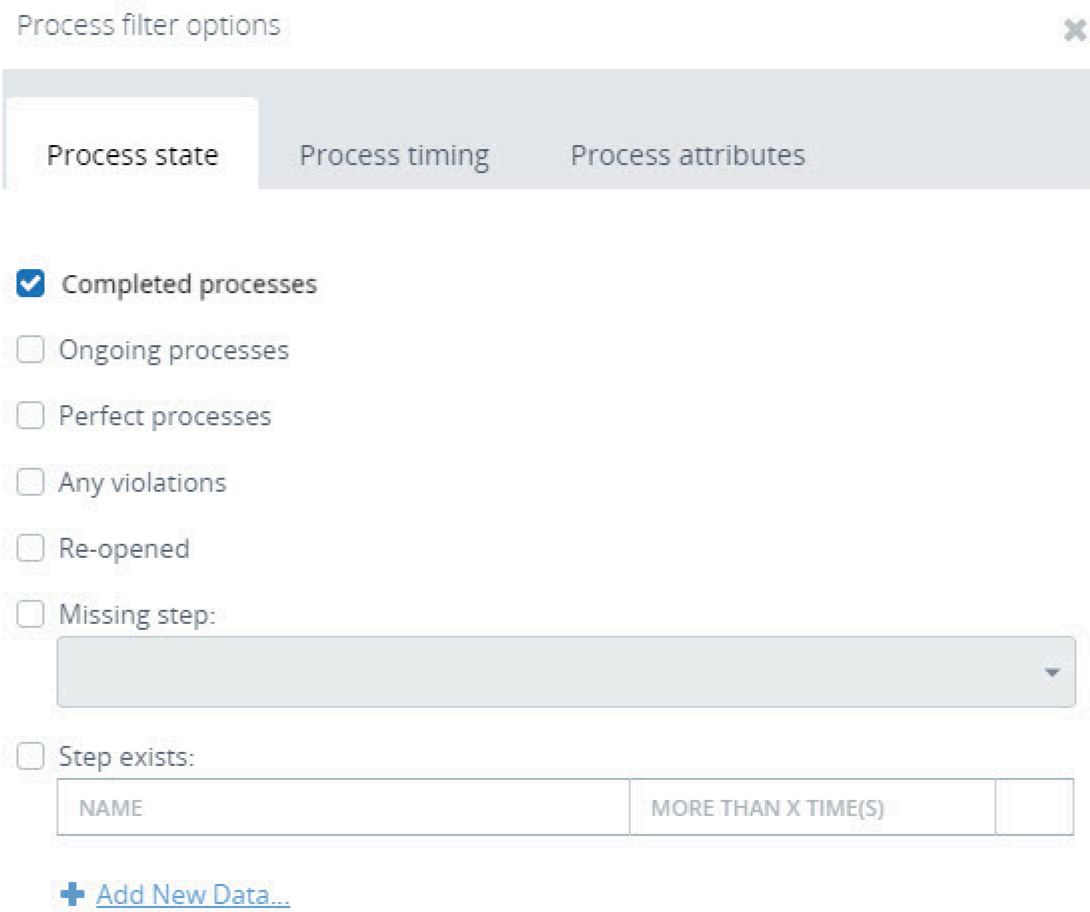
  Values: PO Invoice, Non-PO Invoice.

  Note The Pre-Approved type is included to the Non-PO value.
- **Reset Filters**: Returns the data selection to the default settings.

Right-click a lane to access more options.



For example, select **Process filter** to set the process state, timing, and attributes. On the **Process state** tab, the "Completed processes" value (paid or removed invoices) is selected by default. For more information about additional options, see the Kofax Insight documentation.



Search

Use the Search view to locate invoices based on specific search criteria and the corresponding types of comparison. The search filter specifies the conditions that the entries must meet to appear in the search results. You can combine multiple search filter components. Search values are case-sensitive.

To view the search summary and results, click **Set**.

To return the grids/components to their original states (blank), click **No filter** in the lower left corner. To clear all the search boxes, click **Clear** in the lower right.

For text fields, the types of comparison include:

- Starts: Searches for any values that start with the entered characters.
- Ends: Searches for any values that end with the entered characters.
- =: Searches for any values that exactly match the entry.
- ≠: Searches for any values that do not match the entry.
- Includes: Searches for any values that contain the given search string anywhere in the dimension.

- Like: Searches for any values that match a specified pattern.
  For example, in the Number field, enter x%y to search for invoices that start with x and end with y.
- Between: Searches for a numeric value that falls within a range.

If you perform a numeric search or search for a specific date, the functions offered include the standard mathematic symbols: =, ≠, <, ≤, >, and ≥. When searching for a date, a calendar is provided.

You can also use the Where In to search for a number of values separated by a semicolon. The Where Not In option lets you set a number of values separated by a semicolon that will not be included in the search results.

Switch the values of the PO Invoice, Paid status, and Cancelled status fields:

- : Yes
- : No
- : Not applied

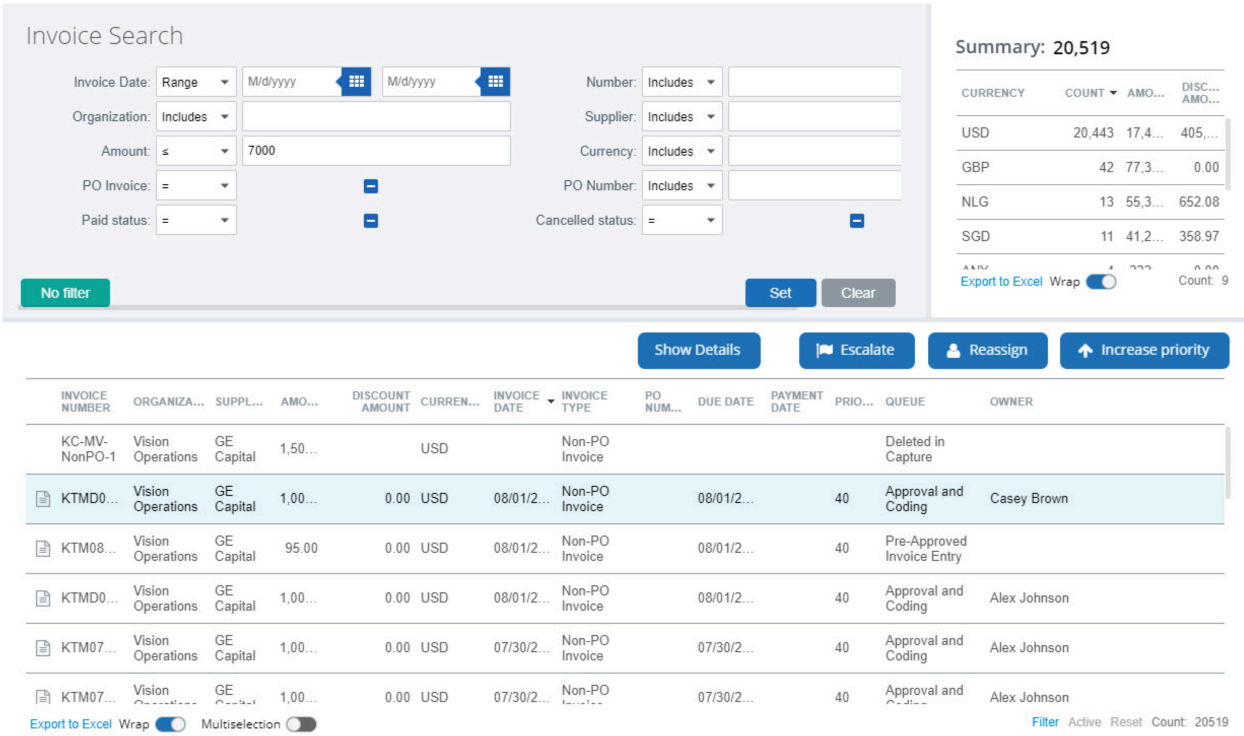
The Summary list displays the invoices count and total amount for each currency, the total invoices count, and the discount amount.

The search results table displays detailed information about all invoices that match the specified search criteria. To view the invoice history in near real time, click the corresponding table line.

Basic search

Use the Basic search option to locate invoices based on the invoice date, organization, amount, invoice type, invoice status, invoice number, supplier name, currency, and PO number.

Note The Pre-Approved invoice type is considered as Non-PO Invoice.



Use the invoice action buttons to take actions on invoices.

Use Show Details button to view the invoice history.

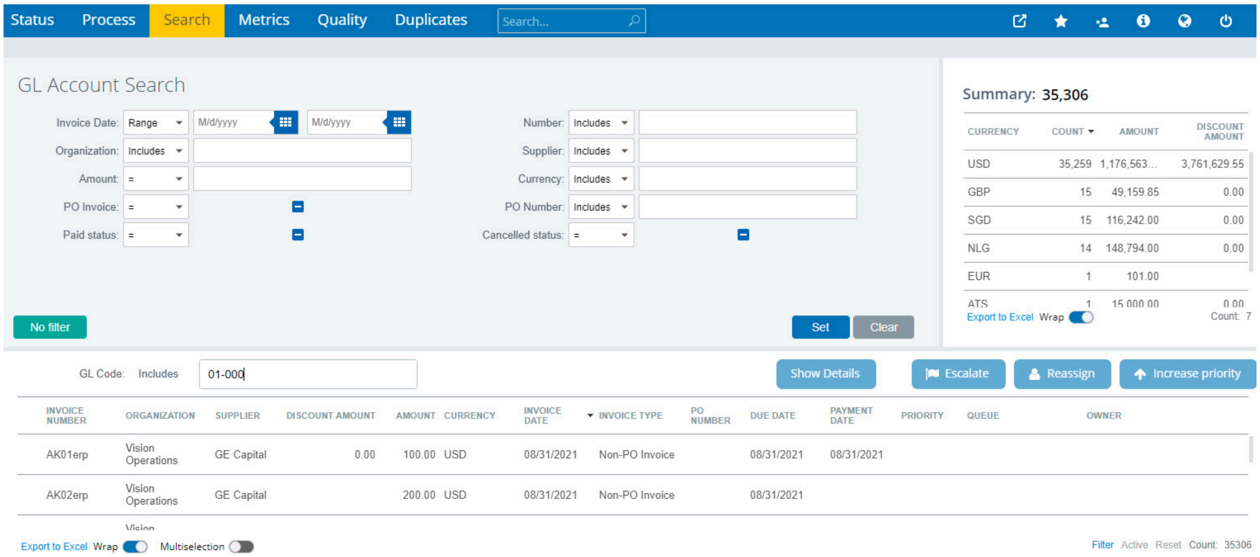
GL Account Search

In addition to the Basic search options, GL Account Search enables locating invoices by GL code.

Note The Pre-Approved invoice type is included to the Non-PO Invoice value.

To search invoice by GL code, you may enter the GL code only and leave the other fields blank.

No filter returns all fields except the GL Account field to their original states (blank). **Clear** clears all search boxes except the GL Account field.



The GL Account Search results can only display invoices with distribution lines.

Because GL Account Search allows for filtering the search results immediately when a user types text in the GL Account field, the invoice Count may display no value. Use the Summary field to review the number of invoices.

Depending on the number of distribution lines, the search process may take some time.

Use the invoice action buttons to take actions on invoices.

Use Show Details button to view the invoice history.

Metrics

This section gives information about the views that are available in the Kofax Analytics for MarkView Metrics tab.

Invoices and Discounts

Use the Invoices and Discounts view to analyze invoices from Kofax Capture, MarkView, and Oracle EBS filtered by the following criteria:

- **Quantity/Amount**: The filter default value is Quantity.

  Click **Amount** to change the numeric data display to the currency amount value.
- **Currency**: The filter default value appears after you select the time period. The currency value is sorted in alphabetical order.
- **Select period**: Set one of the following time interval values.
  - This month: Data for the present calendar month from the first day to the current date.
  - Last month: Data for the previous calendar month.
  - This year: Data for the current fiscal year from the first day to the current date.
  - Custom: Data for the configured period of time.

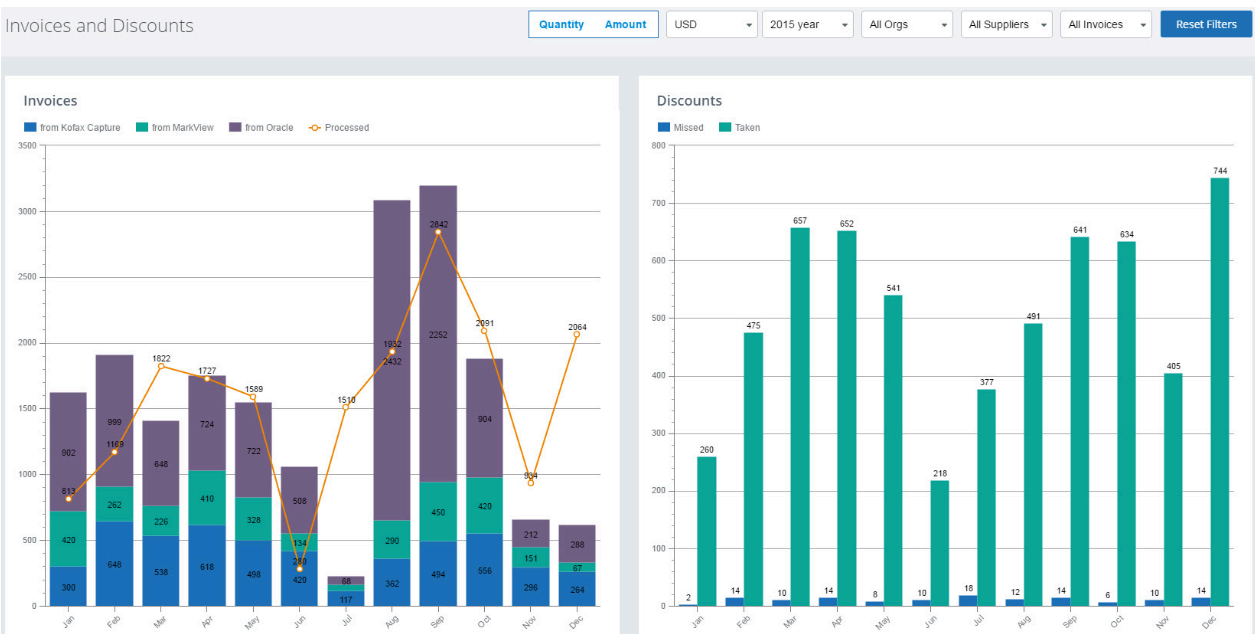
- **All Orgs**: The filter default value is All Orgs. Filters information by organization.
- **All Suppliers**: The filter default value is All Suppliers. Filters information by suppliers.
- **All Invoices**: The filter default value is All Invoices. Filters information by invoice type.

  Values: PO Invoice, Non-PO Invoice.

  Note The Pre-Approved type is included to the Non-PO value.

- **Reset Filters**: Returns the data selection to the default settings.

The Invoices and Discounts view displays the historical data for the processed invoices along with discounts taken or missed.



Invoices chart

The Invoices chart displays the historical data about the created invoices.

When selecting an individual bar or point of a curve in the Invoices chart, you can view the invoice data summary and invoice history for the applied filter. Click bar and graph names at the top of the chart to hide the bar value in the chart.

The bar and graph values that may appear in the Invoices chart include:

- **from Kofax Capture**: Displays the number of invoices created in the Kofax Capture system.
- **from MarkView**: Displays the number of invoices created in the MarkView system.
- **from Oracle**: Displays the number of invoices created in Oracle EBS.
- **Processed**: Displays the number of invoices already paid.

Discounts chart

The Discounts chart displays the historical data about the discounts taken or missed.

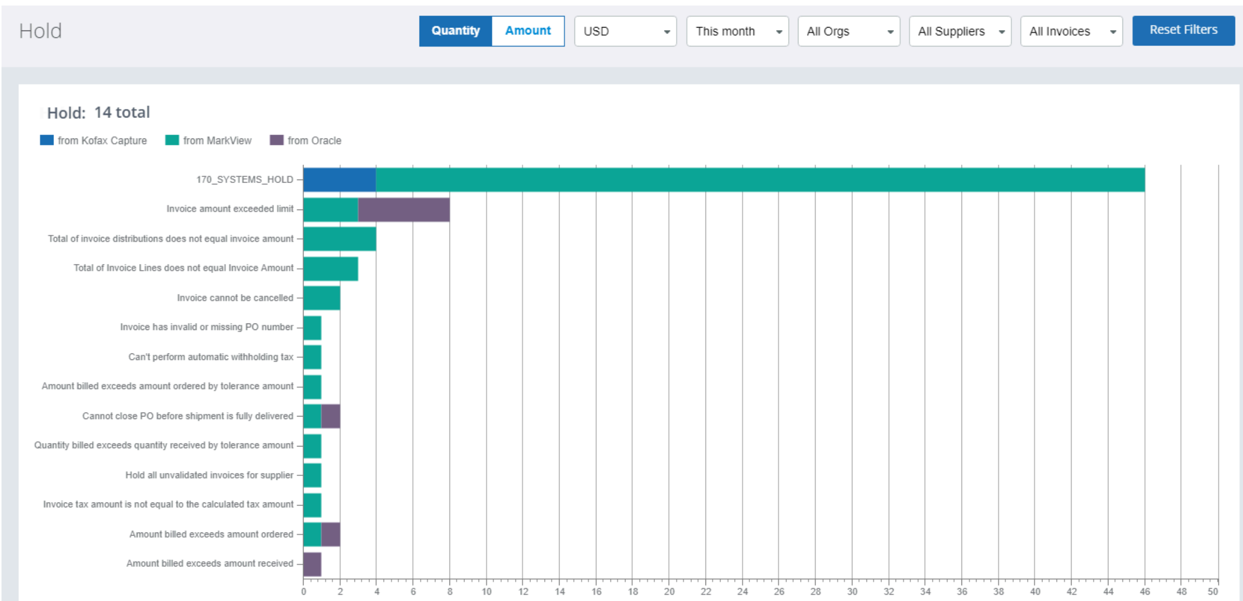
The bar values that may appear in the Discounts chart include:

- **Missed**: Displays the number of invoices with the discounts lost.
- **Taken**: Displays the number of invoices with the discounts taken.

Hold

Use the Hold view to analyze invoices on hold. You can access the view from the main menu under Metrics or from the Status page by pressing the Invoices on hold icon. The horizontal bar chart displays invoices on hold by number or amount. The bars represent different types of hold.

You can filter invoices by source: from Kofax Capture, MarkView, and Oracle (by default, all sources are displayed).



Filter pane elements

The Hold view filter pane comprises the following elements:

- **Quantity/Amount**: The filter default value is Quantity.

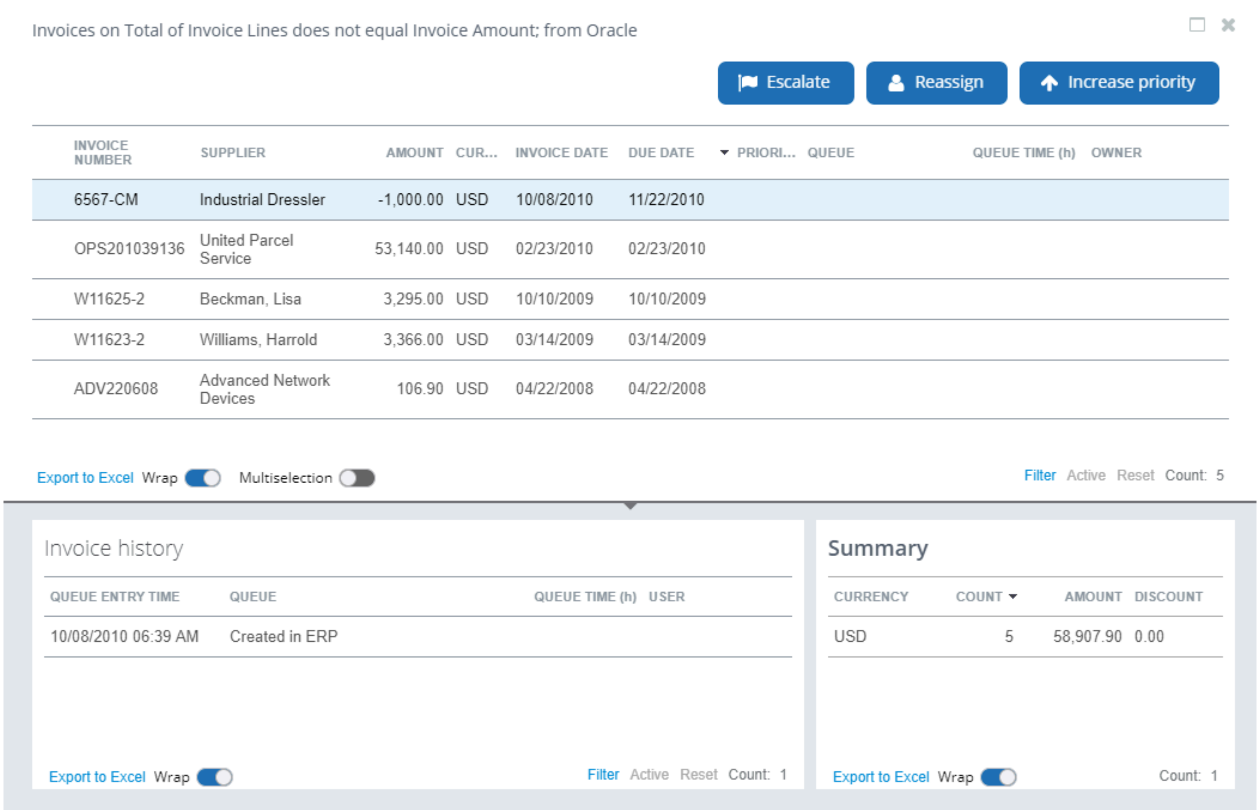
  Click **Amount** to change the numeric data display to the currency amount value.
- **Currency**: The filter default value appears after you select the time period. The currency value is sorted in alphabetical order.
- **Select period**: Set one of the following time interval values.
  - This month: Data for the present calendar month from the first day to the current date.
  - Last month: Data for the previous calendar month.
  - This year: Data for the current fiscal year from the first day to the current date.
  - Custom: Data for the configured period of time.
- **All Orgs**: The filter default value is All Orgs. Filters information by organization.
- **All Suppliers**: The filter default value is All Suppliers. Filters information by suppliers.

- **All Invoices**: The filter default value is All Invoices. Filters information by invoice type.
  Values: Non-PO, PO.
- **Reset Filters**: Returns the data selection to the default settings.

Hold chart

The bars represent different types of hold. The colors differentiate the source of invoices: from Kofax Capture, MarkView, and Oracle (by default, all sources are displayed). Click bar and graph names at the top of the Hold chart to hide the bar value in the chart.

When selecting an individual bar in the Hold chart, you can view the invoice data summary and invoice history for the applied filter. The lists of holds by type and source represent tables that include the following standard columns:



1. Invoice number

   > **Note** Click the **Open in MarkView Viewer** icon to review an invoice in MarkView Viewer.

2. Supplier
3. Amount
4. Currency

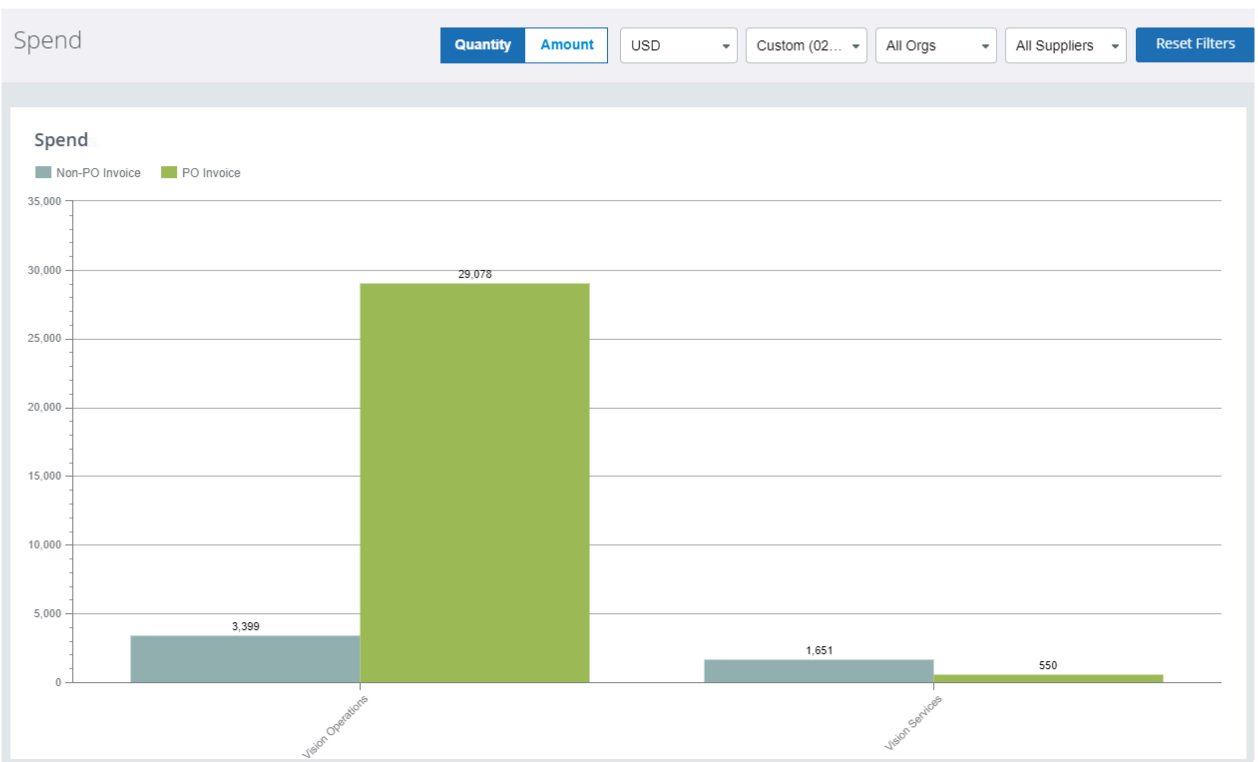
5. Invoice date
6. Due date
7. Priority
8. Queue
9. Queue time
10. Owner

The Invoice history section allows you to see details for a Queue entry time, Queue, Queue time in hours, and User for a single invoice or multiple invoices. The Summary window displays the Currency, Count, Amount, and Discount columns. Use the **Multiselection** option to take an action on multiple invoices.

Use the invoice action buttons to take action on the invoice.

Spend

Use the Spend view to analyze amount or quantity of invoices paid per organization. You can access the view from the main menu under Metrics. The vertical bar graph displays invoices filtered by PO and Non-PO type.



Filter pane elements

The Spend view filter pane comprises the following elements:

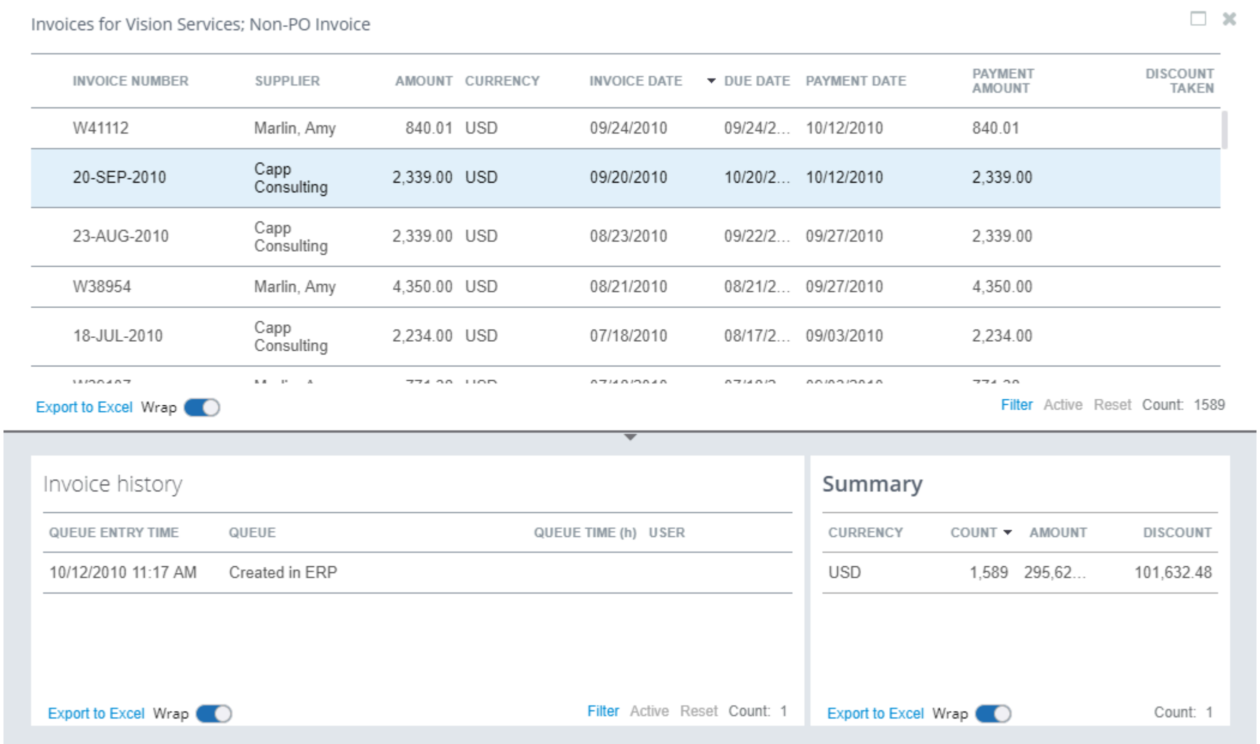
- **Quantity/Amount**: The filter default value is Quantity. Displayed value includes fully and partially paid invoices.

  Click **Amount** to change the numeric data display to the currency amount value.
- **Currency**: The filter default value appears after you select the time period. The currency value is sorted in alphabetical order.
- **Select period**: Set one of the following time interval values.
  - This month: Data for the present calendar month from the first day to the current date.
  - Last month: Data for the previous calendar month.
  - This year: Data for the current fiscal year from the first day to the current date.
  - Custom: Data for the configured period of time.
- **All Orgs**: The filter default value is All Orgs. Filters information by organization.
- **All Suppliers**: The filter default value is All Suppliers. Filters information by suppliers.
- **Reset Filters**: Returns the data selection to the default settings.

Spend chart

The bars represent invoices by organization, differentiated by type (PO/Non-PO). Click bar and graph names at the top of the Spend chart to hide the bar value.

When selecting an individual bar in the Spend chart, you can view the invoice data summary and invoice history for the applied filter. The list of spends is presented as a table that includes the following standard columns:



1. Invoice number

> **Note** Click the **Open in MarkView Viewer** icon to review an invoice in MarkView Viewer.

2. Supplier
3. Amount
4. Currency
5. Invoice date
6. Due date
7. Payment date
8. Payment amount
9. Discount taken

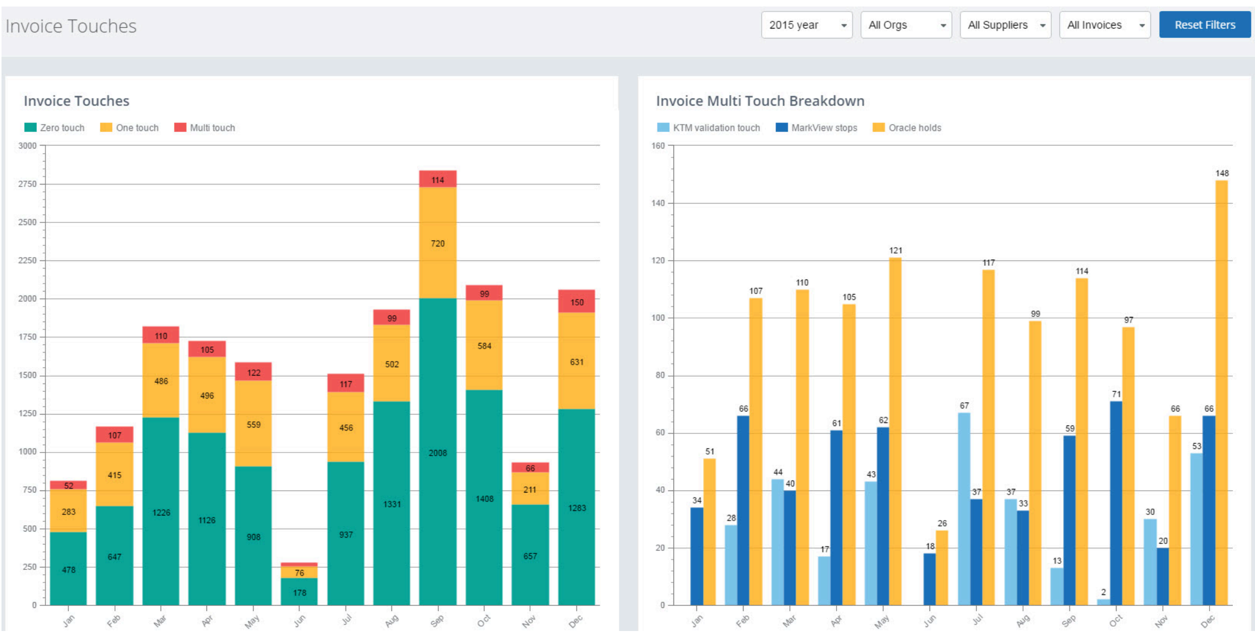
Invoice history section gives you the ability to see details for a Queue entry time, Queue, Queue time in hours, and User for an invoice. The Summary window displays the Currency, Count, Amount, and Discount columns.

Invoice Touches

Use the Invoice Touches view to analyze the information about invoice processing from the user intervention perspective. Use this information to monitor the efficiencies of invoice automatic processing within organizations. The Invoice Touches view displays the historical data for the processed invoices.

The view comprises the following charts:

- **Invoice Touches**: Displays detailed information about the number of manual actions related to invoice processing.
- **Invoice Multi Touch Breakdown**: Displays detailed information about manual actions in each system.

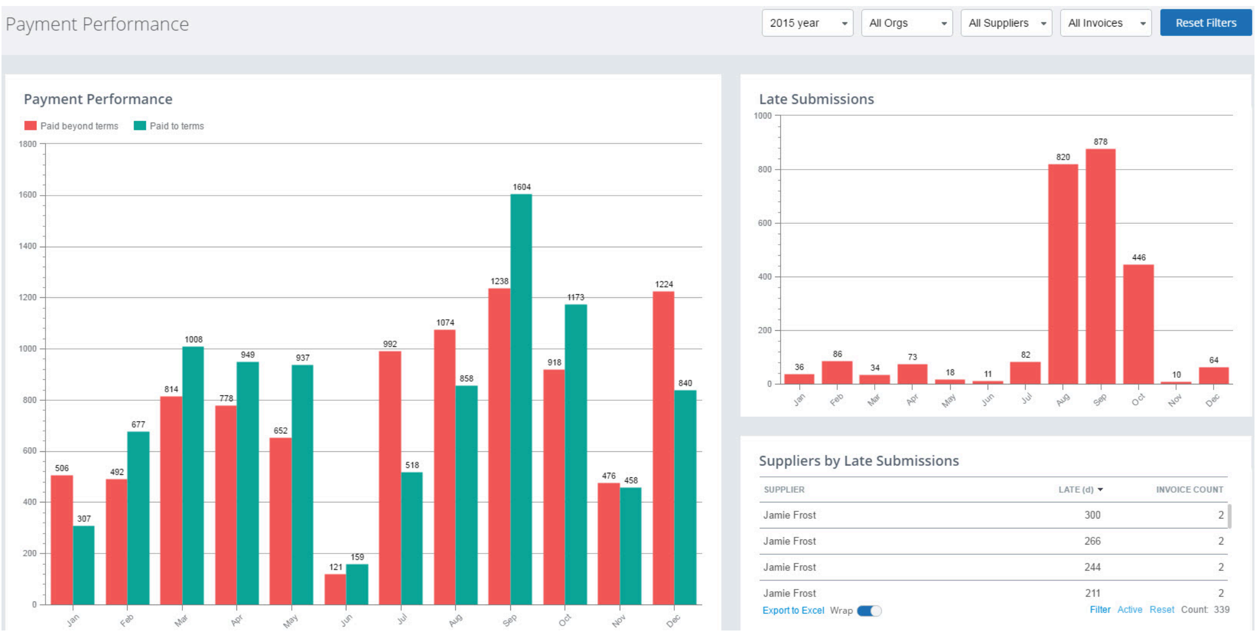


Bar	Description
Multi touch	Provides information about invoices processed with more than one manual action.
One touch	Provides information about invoices processed with one manual action.
Zero touch	Provides information about invoices processed without any manual action.
KTM validation touch	If a user carries out any actions in the Validation module, such as changes or field value confirmations, the indicated actions are considered as one touch. Configure settings that apply to invoice touches in the Administration tab. Click **KTM Validation touch** if you do not want to display the bar in the chart.
MarkView stops	If the invoice processing requires any operator interaction in the Coding, Comment Request, Entry, Resolution, or Review queue, the indicated actions within one queue are considered as one touch. Configure settings that apply to invoice touches in the Administration tab. Click **MarkView stops** if you do not want to display the bar in the chart.

Bar	Description
Oracle holds	If the invoice processing requires any operator interaction at the invoice submission to the ERP system, such an interaction is considered as a touch. The operator interaction includes Price holds and Quantity holds. Price hold example: The price is inconsistent after line matching. Quantity hold example: The quantity of the ordered and supplied items is inconsistent.

Payment Performance

Use the Payment Performance view to analyze invoices payment performance. The view also displays the historical data about invoice late submissions and the list of suppliers that submit invoices beyond time limit.



- **Payment Performance**: Displays the number of invoices paid beyond terms and invoices paid to the fixed terms.

  The content of the metric is aimed at giving suppliers the information they need to make informed decisions about the payment practices of the customers.
- **Late Submissions**: Displays the invoices with the discrepancy in the actual creation date and the date of submission to the ERP system.

  The threshold is configured in Late Submission (days).

  If you change the Late Submission (days) parameter, the **Late Submissions** bar chart numeric values may not be updated. Delete all data and perform the data load from beginning of times.
- **Suppliers by Late Submissions**: Displays suppliers that submitted invoices late.

  Each row represents a supplier and the total number of days of delay. The metric also shows the number of delayed invoices.

Supplier Performance

Use the Supplier Performance view to analyze supplier performance. The view displays the invoice data after payment is completed.

Use the Supplier Performance view filter pane to display data based on the following criteria:

- **Select period**: Set one of the following time interval values.
  - This month: Data for the present calendar month from the first day to the current date. Selected by default.
  - Last month: Data for the previous calendar month.
  - This year: Data for the current fiscal year from the first day to the current date.
  - Custom: Data for the configured period of time. A calendar is provided.
- **All Orgs**: The filter default value is All Orgs. Filters information by organization. The filter applies only to the SUPPLIER column of the table.
- **All Invoices**: The filter default value is All Invoices. Filters information by invoice type.

  Values: PO Invoice, Non-PO Invoice.

  > **Note** The Pre-Approved type is included to the Non-PO value.

- **Reset Filters**: Returns the data selection to the default settings.

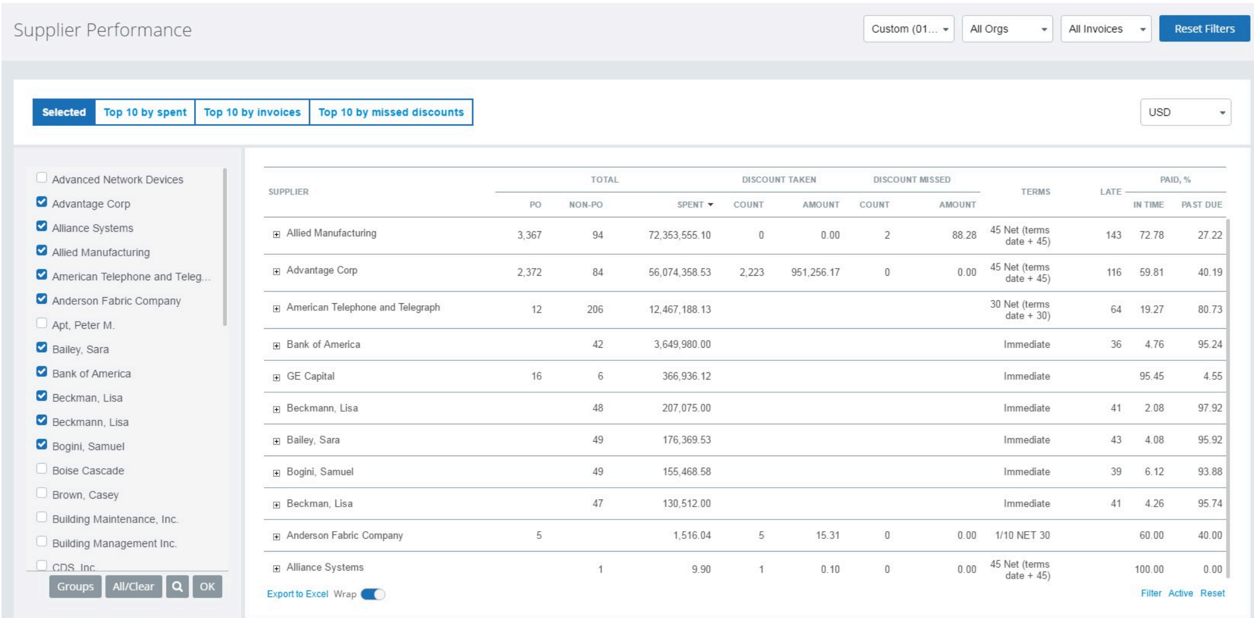
You can also apply the **Currency** filter option. The filter default value appears after you select the time period. The currency value is sorted in alphabetical order.

To export the content of the grid to Microsoft Excel, use the Export to Excel function on the toolbar. Select any **Export content** option depending on your requirements:

- **Current page and top drill down**: The generated Excel file contains up to 20 suppliers from the view source table. The Supplier Performance view columns are collapsed.
- **All pages of grid, top drill down level. Could take some time**: The generated Excel file contains all suppliers from the view source table. The Supplier Performance view columns are collapsed.
- **All pages of grid, all drill down levels. Could take much longer** (default value): The generated Excel file contains all suppliers from the view source table. The Supplier Performance view columns are expanded.

If you select **Enabled** to use a flat export, note that the data in the generated Excel file is sorted by the Total Spent column.

Suppliers list



Filter the list of suppliers by the following criteria:

- **Selected**: Enables selecting suppliers or supplier groups from the given list. Supplier group may include one or more suppliers.

  By default, the suppliers list is filtered by the supplier name in ascending alphabetical order.
- **Top 10 by spent**: Displays ten suppliers with the largest spent amount value for the selected organizations.

  By default, the list is filtered by spent amount value in descending order.
- **Top 10 by invoices**: Displays ten suppliers with the largest quantity of invoices for the selected organizations.

  By default, the list is filtered by the number of PO invoices in descending order.
- **Top 10 by missed discounts**: Displays ten suppliers with the largest quantity of missed discounts for the selected organizations.

  By default, the list is filtered by missed discounts amount in descending order.

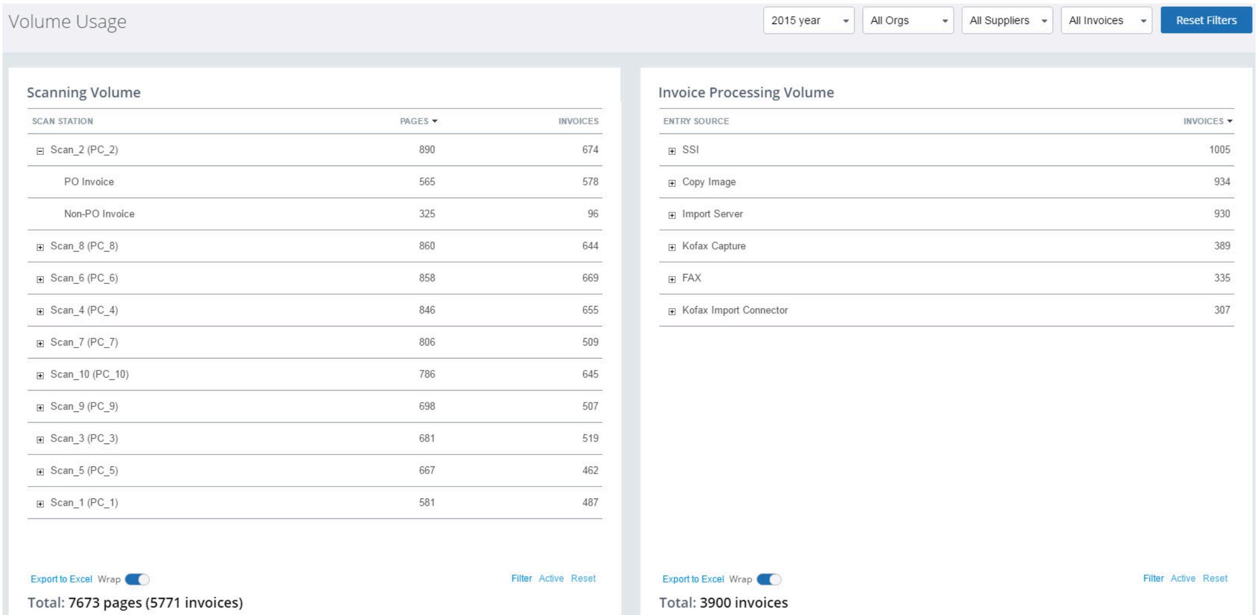
All suppliers lists represent tables that include the following standard columns.

SUPPLIER	TOTAL			DISCOUNT TAKEN		DISCOUNT MISSED		TERMS	LATE	PAID, %	
	PO	NON-PO	SPENT ▼	COUNT	AMOUNT	COUNT	AMOUNT			IN TIME	PAST DUE
⊞ Advanced Network Devices	11,466	673	349,823,368.65	50	25,796.14	1	24,500.00	Immediate	592	17.36	82.64
⊟ Allied Manufacturing	3,367	94	72,353,555.10	0	0.00	2	88.28	45 Net (terms date + 45)	143	72.78	27.22
⊟ Vision Operations	3,367	94	72,353,555.10	0	0.00	2	88.28		143	72.78	27.22
PO Invoice	3,367		72,270,098.38	0	0.00	2	88.28		49	74.01	25.99
Non-PO Invoice		94	83,456.72						94	28.72	71.28
⊞ Advantage Corp	2,372	84	56,074,358.53	2,223	951,256.17	0	0.00	45 Net (terms date + 45)	116	59.81	40.19

- Total PO/Non-PO invoices: Displays the total number of invoices processed through MarkView.
- Total spent: Displays the total spent amount value for all invoice types and all organizations in the selected currency value.
- Discounts taken by supplier: Displays the number of invoices with taken discounts and the total taken discounts amount.
- Discounts missed by supplier: Displays the number of invoices with missed discounts and the total missed discounts amount.
- Payment terms: Displays the default terms for suppliers and enables a user to detect candidates for improved terms and discounts opportunities.
- Late submission: Displays the total number of invoices that exceed the Late Submission (days) parameter.
- Paid in time, past due: Displays the percentage of invoices paid on time and invoices with the past due date.

Volume Usage

The Volume Usage view comprises the Scanning Volume Info and Invoice Processing Volume Info lists.



Scanning Volume displays a number of invoice documents and pages scanned on each Kofax Capture station.

The list includes only batches of the MarkView Invoice batch class with the PO INVOICE, NON-PO INVOICE, or PRE-APPROVED INVOICE document type.

Scanning Volume shows the data after export or deleting. The time filter is applied to the export time.

The view displays only data from the Scan station and does not include the data about invoices created in other modules. The list indicates any changes such as adding, removing, and splitting for the Scan module only.

If a document was repeatedly scanned, the Pages column displays the latest value.

The Invoices column displays the total number of invoices on each scan station. If you send a batch to another scan station, a new StationID becomes associated with invoices in this batch and the Invoices column value includes all invoices of this batch.

Expand the scan station in the list to review the information for a certain invoice type: PO or Non-PO.

Invoice Processing Volume displays a number of invoices: PO Invoice, Non-PO Invoice, and Pre-Approved Invoice grouped by invoice source.

Invoice Processing Volume shows the data after an invoice work item was created.

The time filter is applied to the time when a work item was created in MarkView.

Expand the entry source in the list to review the information for a certain invoice type: PO or Non-PO.

Use the following filter pane options for both Volume Usage lists:

- **Select period**: Set one of the following time interval values.
  - This month: Data for the present calendar month from the first day to the current date. Selected by default.
  - Last month: Data for the previous calendar month.
  - This year: Data for the current fiscal year from the first day to the current date.
  - Custom: Data for the configured period of time. A calendar is provided.
- **All Orgs**: The filter default value is All Orgs. Filters information by organization.
- **All Suppliers**: The filter default value is All Suppliers.
- **All Invoices**: The filter default value is All Invoices. Filters information by invoice type.

  Values: PO Invoice, Non-PO Invoice.

  > **Note** The Pre-Approved type is included to the Non-PO value.

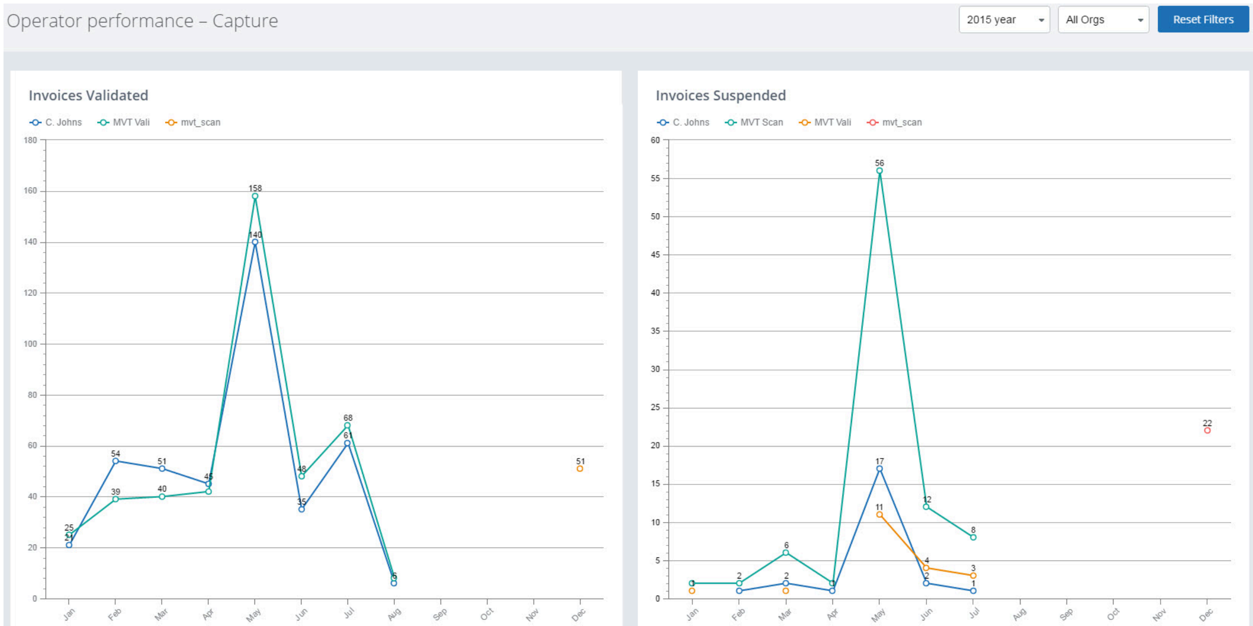
- **Reset Filters**: Returns the data selection to the default settings.

Operator performance - Capture

The Operator performance - Capture view is only available if you use Kofax Analytics for MarkView with Kofax Capture.

The view provides a quick overview of the efficiency and productivity in the invoice validation process. The view also displays the historical data about the users who suspended invoices during processing in the Kofax Capture system.

Click any items in the charts to drill down to the invoice details such as the invoice number, supplier, amount with the currency, invoice date, due date, and history.



- **Invoices Validated**: Displays the users that validated invoices in Kofax Capture.

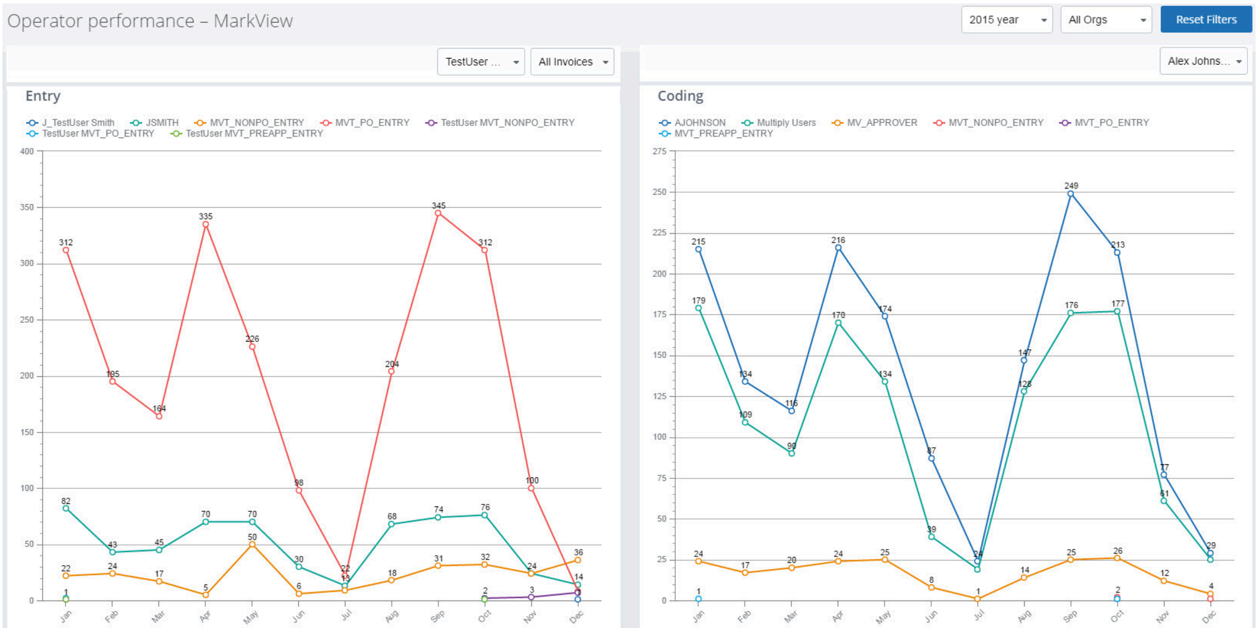
  The numeric value on the line represents the number of invoice validation operations performed by a user within the specified time interval. The validation operation for such invoices should be completed. The numeric value on the line may not coincide with the number of invoices because a user can validate the same invoice more than once. Click the numeric value to review the list of validated invoices.
- **Invoices Suspended**: Displays the users that suspended invoices in Kofax Capture. Use the graphs to analyze the historical data about invoices in the suspended state.

  The numeric value on the line represents the number of suspension operations performed by a user in any module within the specified time interval. The numeric value on the line may not coincide with the number of invoices because a user can suspend the same invoice more than once. Click the numeric value to review the list of suspended invoices.

Operator performance - MarkView

Use Operator performance - MarkView to analyze the historical data about users that performed manual entry or invoice coding in the MarkView system.

Click any items in the charts to drill down to the invoice details such as the invoice number, supplier, amount with the currency, invoice date, due date, and history.



- **Entry**: Displays the users that manually enter invoices. You can filter users by groups or an individual user or by a source of invoices (All Invoices/MarkView).
- **Coding**: Displays the users that perform coding operations.

  If a number of users perform coding operations for the same invoice, Kofax Analytics for MarkView applies the Multiple Users value to it. You can filter users by groups or an individual user.

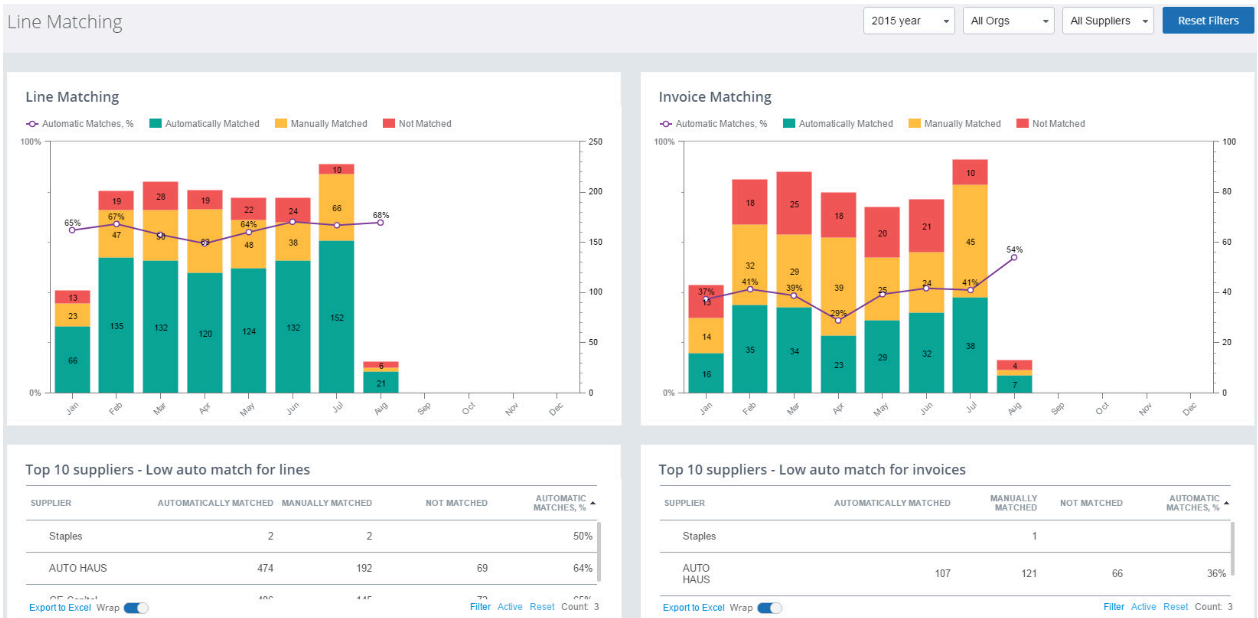
Quality

The Quality tab is available if you use Kofax Analytics for MarkView with Kofax Capture and Kofax Transformation Modules.

Line Matching

The Line Matching view displays the result of Kofax Transformation Modules Invoice PO lines matching with PO lines in the ERP system. The view also shows how Kofax Transformation Modules validates invoice lines.

Use Line Matching to define line matching performance based on the matching percentage by supplier. Review the list of suppliers with low automatic matching efficiency and determine if the issue relates to the supplier invoice format, to the matching logic, or to the capture process.



The Line Matching section includes the following components:

- **Automatic Matches, %**: Displays the total percentage of automatically matched lines.
- **Automatically Matched**: Displays a number of successfully extracted and automatically matched lines. The case does not require user intervention.
- **Manually Matched**: Displays a number of manually validated and successfully matched lines.
- **Not Matched**: Displays a number of lines not matched automatically or manually. Batches for invoices are sent to the Exception Handling and are validated by force. If a PO Invoice does not have lines after forced validation, the **Not Matched** bar displays it as one line.

If you click a Line Matching chart bar to view more details, the new pop-up window displays the information by invoices, not lines. Invoices with at least one manually matched line are displayed as manually matched invoices.

The Invoice Matching section includes the following components:

- **Automatic Matches, %**: Displays the total percentage of invoices with automatically matched lines.
- **Automatically Matched**: Displays a number of invoices with all lines that are successfully extracted and automatically matched.
- **Manually Matched**: Displays a number of invoices with at least one line that is manually matched. All lines in an invoice are matched.
- **Not Matched**: Displays a number of invoices with at least one line that is not matched automatically or manually.

Top 10 Suppliers lists show line matching statistics by suppliers. Tables include the data about ten suppliers with the lowest automatic match percentage.

Field Statistics

Field Statistics is only available if you use Kofax Analytics for MarkView with Kofax Capture.

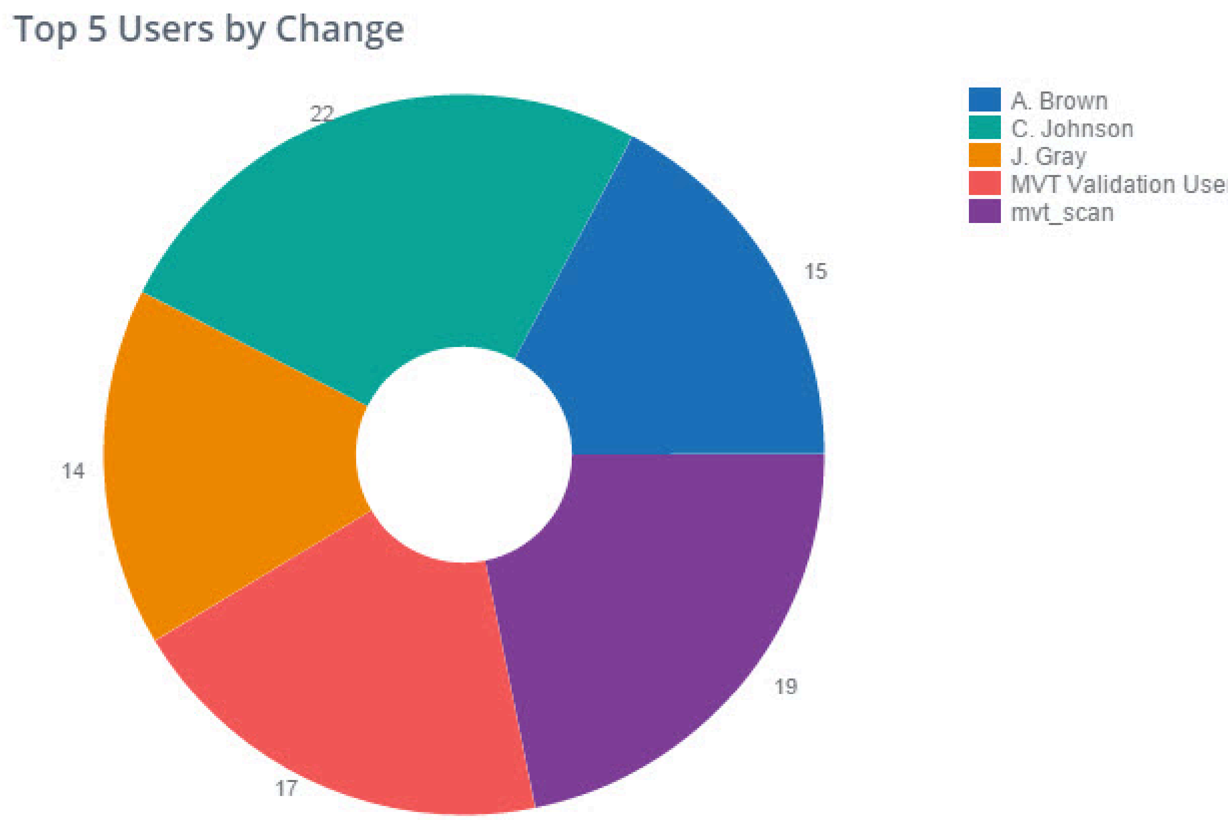
Use the Field Statistics view to analyze the statistics for all fields and users by change ratio. The view displays the Field Statistics grid, the Top 5 Users by Change pie chart, and the Top 5 Suppliers by High Change Ratio chart.

Field Statistics displays a list of all fields. The data represents the total number of fields for all users.

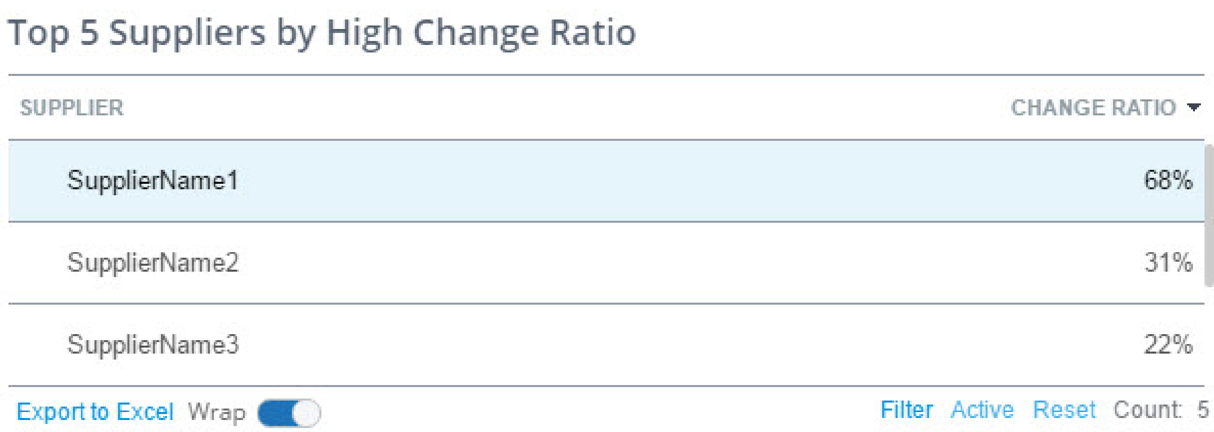
You can click the table line to view details for individual fields in the Top 5 Users by Change pie chart.

The Field Statistics grid also displays the total number of changed fields and the change ratio.

The Field Statistics grid shows only fields selected by the administrator on the Administration tab.



Top 5 Suppliers by High Change Ratio displays the five suppliers who changed the selected field most often.



Quality Benchmark

The Quality Benchmark is only available if you use Kofax Analytics for MarkView with Kofax Capture and Kofax Transformation Modules.

Use the Quality Benchmark view to examine overall operator activity related to field validation. Based on this view, you can determine how many fields were accurately detected by the system. The view displays field statistics only for the Header values.

The view displays the following components:

- **Extraction Monitor**: Displays field validation accuracy for the configured Correct and Valid level threshold.

  If the field validation accuracy value exceeds the configured threshold, the level indicator is green. If the field validation accuracy value is lower than the configured threshold, the level indicator is red.

  The Extraction Monitor chart shows the data after documents are exported in Kofax Capture.
- The field extraction statistics list displays field validation accuracy expressed as a percentage, on a per-field basis.

  The field extraction statistics values are listed in the table.

Field extraction statistics values	Description
Correct and Valid (true positive)	Correct: No changes were made to the field value. Field is correct and detected as valid by the system. Field requires no adjustments by validation operator during processing (no touch).
Correct but Invalid (false negative)	Field is correct yet detected as invalid by the system. Operator must press Enter to confirm the validity of the field.
Incorrect and Invalid (true negative)	Incorrect: Field value was changed manually by the validation operator. Field is incorrect and detected as invalid by the system. Operator is prompted to perform data entry or make corrections that occur as a result of OCR or database errors, or untrained documents.
Incorrect but Valid (false positive)	Field is incorrect yet detected as valid by the system. If the operator does not make corrections, inaccurate data remains in the system.

Potential Duplicates

Use the Potential Duplicates view to analyze the list of Kofax Capture and MarkView invoices that are potential duplicates. The view displays potential duplicate unpaid invoices within the same organization.

The Review action lets you mark a set of duplicate invoices as reviewed. Use the **Multiselection** function to mark multiple pairs of duplicate invoices as reviewed at the same time. Marking invoices as reviewed permanently removes them from the view. Lines removed may reappear if the resolved invoices are updated.

Two filter options are available for the view:

- **Date, Supplier, Amount**: Displays the list of potential duplicate invoices with the same invoice date, supplier, amount, and currency.
- **Number, Supplier, Amount**: Displays the list of potential duplicate invoices with the same supplier, amount, currency, and similar invoice number.

  The similar invoice number is a predefined value that is configured for Similar number length by the administrator.

Appendix A

Troubleshoot your installation

This appendix identifies conditions you might encounter and suggests ways to resolve them and includes helpful tips. For more information, see the Known Issues section in the release notes.

Kofax Analytics for MarkView Setup Wizard error

The installer identifies the Oracle EBS version and starts the corresponding SQL scripts. If you see error messages when running the scripts, view the SQL sequence and execution results in the log file. The setup wizard specifies the log file location if the installation fails.

Problems with Workflow Agent and Windows Service

To avoid problems with the Workflow Agent and Windows Service, make sure that your environment is configured correctly:

1. Verify that Kofax Analytics for MarkView Workflow Agent is associated with the **MarkView Invoice** batch class:
   - In the Kofax Capture Administration module, right-click the **MarkView Invoice** batch class and select **Properties**.
   - Select the **Workflow Agents** tab and verify that Kofax Analytics for MarkView Workflow Agent is in the list of associated agents.
2. Verify that the connection string to the Kofax Analytics for MarkView schema is set up correctly:
   - In the Kofax Capture Administration module, right-click the **MarkView Invoice** batch class and select **Configure Kofax Analytics for MarkView**.
   - Ensure that the connection data is correct and click **Test** to test connection.
3. Verify that the **MarkView Invoice** batch class was published successfully.
4. Verify that the Windows Service started successfully.
5. Verify that the System Event log does not contain error messages from the Workflow Agent and Windows Service:
   - From the command prompt, start the Windows Event Viewer console or open the **Run** window and execute the `eventvwr` command.
   - Expand Windows Logs and select **Application**.
   - Check event messages from KMWA.WindowsService.

Note The Workflow Agent and Windows Service must be installed on all Kofax Capture server and client workstations.

Kofax Capture fails to process data

If you do not receive data from Kofax Capture, verify that the `KAMV_XML_PENDING` table of the Kofax Analytics for MarkView schema is empty. If `KAMV_XML_PENDING` contains data, contact Kofax Technical Support for more information and be prepared to provide the data about the following SQL queries:

- `SELECT * FROM KAMV_XML_PENDING;`

  This table contains XML data that cannot be processed by the Kofax Analytics for MarkView schema with additional information about possible reasons (error message text).
- `SELECT * FROM KAMV_LOG_OUTPUT;`

  This table contains additional output including error messages.

View data not updated

If the Kofax Analytics for MarkView views data is not updated, verify that you set the appropriate data load period in Insight and save changes.

Log files location

WorkFlow Agent and Windows Service log files

By default, the Workflow Agent and Windows Service log files are available in the System Event Log.

To open Windows Event Viewer, from Windows Search, select Run and enter eventvwr.

Note Export the Application Event Viewer log file in the EVTX format.

Kofax Insight log files

All Kofax Insight log files are located in `C:\temp\` on the Insight Application Server.

Kofax Insight Log Files

Log File	Description
WcfDataService.log	Information about services used to get data from MetricsMart to the dashboard service. Insight Authentication/Administration service log.

Log File	Description
DataProcessing.log	Dashboard queries to MetricsMart to get data for dashboard display.
InsightServer_WinApp.log	Execution details for the data load.
Scheduler.log	Information about scheduled data load execution.

Logging level changes

Debug logging for Kofax Analytics for MarkView Workflow Agent

To activate debug logging, follow these steps on the Kofax Capture with Kofax Transformation Modules workstation:

1. Open the Workflow Agent installation folder.
2. Locate and back up the KMWA.Agent.dll.config file.
3. Open KMWA.Agent.dll.config for editing:
    a. Locate the log4net configuration:

    `<log4net>...</log4net>`

    b. Change the level value from "INFO" to "DEBUG" in the following line:

    ```
    <root>
    <level value="INFO" />
    ```

    To disable debug level, change the value to "INFO".
4. Restart all opened Kofax Capture modules.

Debug logging for Kofax Analytics for MarkView Windows Service

To activate debug logging, follow these steps on the Kofax Capture with Kofax Transformation Modules workstation:

1. Open the Windows Service installation folder.
2. Locate and back up the KMWA.WindowsService.exe.config file.
3. Open KMWA.WindowsService.exe.config for editing:
    a. Locate the log4net configuration:

    `<log4net>...</log4net>`

    b. Change the level value from "INFO" to "DEBUG" in the following line:

    ```
    <root>
    <level value="INFO" />
    ```

    To disable debug level, change the value to "INFO".
4. From Windows Search, select **services.msc** to restart the Kofax Analytics for MarkView Service.

Logging for Kofax Insight

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

1. On the Insight Server, navigate to `<Insight_installation_directory>\WcfDataService`.
2. Back up the web.config file.
3. Open web.config for editing:
    a. Locate the line containing:
    `Insight.DataProcessing.Readers.IsLoggingEnabled`
    b. Set the value to TRUE.
    To disable logging, set the value to FALSE.
4. Right-click the report that is causing problems and select **Logging**.
5. Right-click the report and select **Reset**.

Note By default, Insight logs all authentication queries. The log file can contain a user password.

To disable query logging:

1. In the `<Insight_installation_directory>\WcfDataService` directory, open `web.config` for editing.
2. Set the `LogQuery` value to `false`. You do not have to restart Insight to activate the changes.

Data loading

Email notification

Use email notifications to monitor data load operations progress and get alerts about errors that can occur during data loading.

To enable email notifications for Kofax Analytics for MarkView:

1. Verify that you configured the SMTP server in Kofax Insight Admin Console following the instructions in the Insight documentation.
2. Start Kofax Insight Studio and log in as Administrator.
3. Select KAMV Project.
4. On the **Tools** tab, click the **Studio settings** icon.
5. Expand **Configuration settings**.

6. Under **Server**:
   - Fill in the "Data load email recipient" field if you need to get notifications about all data load operations.
   - Fill in the "Data load errors email recipient" field if you need to get notifications about errors that occurred during data loading.
7. Save changes.

IIS session recycling

Due to default recycling (clearing of sessions) conditions implemented in the IIS Web Server, the data load process can fail with the following error:

```
AltoSoft.Insight.Common.UnknownSessionException: Session expired.
```

The default recycling condition for an Application Pool on IIS is 1740 minutes (29 hours). If a scheduled data loading and the recycling condition coincide then this error can occur as IIS is clearing the session.

To prevent this issue from occurring, the recycling conditions for the IIS Application Pools on your IIS Server can be updated by specifying an exact time instead of an interval. Ensure that this exact time does not conflict with your data load schedule.

For more information about Recycling settings on IIS, go to the IIS website.