# Kofax Analytics for Process Director

## Installation and Configuration Guide

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KOFAX

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# Preface

This guide includes instructions for installing, configuring, upgrading and administering Kofax Analytics for Process Director.

Read this guide completely before using the software. This guide was written with the assumption that you have a basic understanding of Kofax Process Director and Kofax Insight.

## Introduction

Kofax Analytics for Process Director is an auxiliary product for Kofax Process Director that produces a graphical business intelligence dashboard based on data collected from SAP. Kofax Analytics for Process Director presents business and finance processes data in graphical and interactive views.

Kofax Analytics for Process Director 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 Process Director brings together data from the SAP system and Kofax Process Director to give you strategic information about your business activities. Kofax Analytics for Process Director provides the insight and metrics required to analyze the effectiveness of business processes.

With Kofax Analytics for Process Director you can:

- Review invoice summary data
- Take advantage of available discounts
- Prioritize daily activities
- Optimize cash resources
- Take action to meet key performance indicators

## Related documentation

The full documentation set for Kofax Analytics for Process Director is available online:

https://docshield.kofax.com/Portal/Products/KAPD/KAPD.htm

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

- Kofax Analytics for Process Director Release Notes: The release notes contain the latest product information that may not be included in other Kofax Analytics for Process Director documentation.
- Kofax Analytics for Process Director Technical Specifications.

- Kofax Analytics for Process Director Help: The help describes how to use Kofax Analytics for Process Director.
- Kofax Insight documentation: The product documentation for Kofax Insight 6.4.0 is hosted online: https://docshield.kofax.com/Portal/Products/Insight/6.4.0-yznsd78sen/Insight.htm.

## Offline documentation

To make the documentation available for use in offline mode, obtain the documentation files from the Kofax Analytics for Process Director product package that you downloaded from the Kofax Fulfillment Site. The product package includes the KofaxAnalyticsForProcessDirectorDocumentation_1.0.0_EN.zip , which contains the entire documentation set in English.

The .zip file contains a print folder, from which all Kofax Analytics for Process Director guides can be saved at any convenient location.

# 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:

1. Go to the Kofax website home page and select **Support**.
2. When the Support page appears, select **Customer Support** > **Knowledge Base**.

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.

From the Knowledge Base home page, you can:

- Access the Kofax Community (for all customers).

  Click the **Community** link at the top of the page.
- Access the Kofax Customer Portal (for eligible customers).

  Click the **Support** link at the top of the page. When the Customer & Partner Portals Overview appears, click **Log in to the Customer Portal**.

- Access the Kofax Partner Portal (for eligible partners).

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

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

## System requirements

Software requirements for Kofax Analytics for Process Director are listed in the Technical Specifications document, which is available from the Kofax Knowledge Base on the Kofax website. The document is updated regularly, and we recommend that you review it carefully before installing your product.

A customer portal login is necessary to access the Kofax Knowledge Base.

Chapter 1

# Install Kofax Analytics for Process Director

Kofax Analytics for Process Director 1.0.0 is available as a separate product for the customer. The following installation scenarios are available.

- Customer uses SAP ERP (ECC or S/4HANA) on premise: Kofax Analytics for Process Director can be installed and configured to provide statistical information about invoices in the ERP system.
- Customer uses SAP ERP with Kofax Process Director Accounts Payable installed: Kofax Analytics for Process Director can be installed and configured to provide statistical information about invoices in the ERP system and about documents in Kofax Process Director Accounts Payable, including information about started workflows.
- Customer uses SAP ERP, Kofax Process Director Accounts Payable, and ReadSoft Invoices: Kofax Analytics for Process Director can be installed and configured to provide information about invoices in the ERP system, documents in Kofax Process Director Accounts Payable and capture-related statistics like field extraction benchmark.

In case a customer uses another OCR/Capture solution for extraction of invoice-related data and sending this data to Kofax Process Director Accounts Payable, Kofax Analytics for Process Director will support special views that can be configured and used for loading capture-related data. The customer can do customization and load the required fields to see the capture-related information in the reports.

## Installation package

The installation package will be available as the .zip file with the following name: Kofax_Analytics_for_Process_Director_1.0.0.zip.

The customer should extract the files from the .zip package into a separate directory (named `<DistributionPackage>` in the steps below) to perform installation.

The package consists of the following sub-folders.

- **SAP**: includes the SAP transports that should be imported into the ERP system.
- **Insight**: includes the Kofax Analytics for Process Director project for Kofax Insight and common SQL scripts.
- **RSI**: includes the installer of the ReadSoft Invoices plugin and common SQL scripts.

The installation steps for each part of Kofax Analytics for Process Director are described in the sections below.

# Import the SAP transports

The import of SAP transport should be performed by the person who is familiar with how SAP transport system works and with transport-related activities and terminology.

1. Copy the following transport files to the appropriate transport directory of the SAP system (...\TRANS\):
   **Example**
   - For installation on SAP without Kofax Process Director Accounts Payable:
     `<DistributionPackage>\SAP\Extractor_for_SAP`
   - For installation on SAP with Kofax Process Director Accounts Payable:
     `<DistributionPackage>\SAP\Extractor_for_PDAP`

   The transport files are already located in the correct COFILES and DATA subdirectories. If it is not possible to copy the files directly into the transport folder because of access restrictions, use the binary methods to transfer the files.
2. In the SAP GUI, start the transaction STMS.
3. Open the import queue in the SAP system.
4. In the main menu, open **Extras** > **Other requests** > **Add**.
5. Add the required transport request to the import queue with the actual transport request listed in the table.

| Installation type | Transport |
|---|---|
| Installation for SAP without Kofax Process Director Accounts Payable | FQAK0001 |
| Installation for SAP with Kofax Process Director Accounts Payable | FQAK0002 |

6. Select the transport request in the import queue and click **Import Request** or use the keyboard shortcut `Ctrl+F11`.
7. In the **Import Transport Request** window
   a. Set **Target Client** value.
   b. On the **Date** tab, select **Immediate** for the Start Date.
   c. On the **Options** tab, select **Ignore Invalid Component Versions** among Import Options.
8. Click **Continue**.
9. In the **Start Import** dialog box, review the import options and click **Yes** to start import.
10. Refresh import queue and verify that the import ended successfully without any import errors. Any warnings issued (return code 4) during the import can be ignored. Important: If you get a return code greater than 4, do not import any further transport requests. Contact Technical Support for assistance and provide details of the first log with return code > 4.

# Import the Kofax Insight project

Installation of the Kofax Insight project consists of the three parts.

- Creation of the META, DATA and STAGE databases.
- Importing the Kofax Insight project.
- Applying the SQL script to support updating the data during data-load operation.

## Create the MS SQL databases

Create the Kofax Insight project databases using MS SQL Server tools such as Microsoft SQL Server Management Studio.

- Meta database: create the meta database with any name (e.g. KAPD_META).
- Data database: create the data database with any name (e.g. KAPD_DATA).
- Staging database: create the staging database with any name (e.g. KAPD_STAGE).

The information about these databases and required access privileges is described in the Kofax Insight Installation Guide within "Project databases" and "Database access rights" sections.

## Import the Kofax Insight project

Perform the following steps to import the Kofax Insight project for Kofax Analytics for Process Director.

1. Start Kofax Insight Setup Analytics Project page.
2. On the **Kofax Analytics Solution selection** screen, click the ellipsis button located in the **Setup a Kofax Analytics Solution .zip file** field.
3. Select the **File is located on the client computer ...** option and click **OK**.
4. In the `<DistrubutionPackage>/Insight/` folder, select the project file `KofaxAnalyticsForPD.zip` and click **Open**.
5. Keep the **Create new project** option selected and click **Next**.
6. On the **Create new project** screen, enter the project name and specify the connection data for Meta and Data databases. Click **Connect** to verify connection data.
7. Click **Next**.
8. In the confirmation dialog that states that the project will be uploaded into the specified databases, click **Yes**. Wait until the import of the analytics solution is finished.
9. On the **Capture** screen, specify the connection data to a database that will be used for collecting capture-related data. You can use a pre-created Staging database or create a separate database. Click **Connect** to verify connection.

   Use Staging database connection data in case the Capture solution is not used for the analytics project.

10. Click **Next**.
11. On the **Staging DB** screen, specify the connection data to the Staging database. Click **Connect** to verify connection.

12. Click **Finish**.
The next screen will contain information that the new analytics project was successfully created.
13. Click on the **Open Admin Console** hyperlink to start Admin Console and log in as Administrator.
14. In the Admin Console, expand the list of projects and select the project created for Kofax Analytics for Process Director.

> The project name was specified in step 6.

15. Expand **System Options** and find the **File parser root folder** field.
16. Enter the path to the folder that will be used for importing the incoming .csv files with SAP and Kofax Process Director Accounts Payable data. The folder path can be relative or absolute.
The folder will be used by the file parser. Please ensure that the folder exists in your file system and has the same name as the Directory for zip archive located in **Studio** > **File Processor** > **Batches** > **AnalyticsForSapBatches**. Additionally, create a sub-folder named "zip" within the specified path.
17. Save the changes.
18. On the **Documents tree** panel, expand **Roles** and select the **Default role**.
19. On the **Default view** tab, select the project name created for Kofax Process Director Accounts Payable.
20. Select the **Analytics Home** view and set it as default using **PC default**, **Tablet default**, and **Phone default** buttons.
21. Save the changes.
22. Start Kofax Insight Studio and log in as Administrator.
23. On the **Documents tree** panel, select the project created for Kofax Analytics for Process Director solution.

> The project name was specified in step 6.

24. On the central panel, select **Tools** tab and click **Project settings**.
25. In the **Project settings** dialog, find the **FILE PROCESSOR** > **Parsing manager** > **Staging Connection** setting and click on the ellipsis button.
26. In the **Documents tree** dialog, select the **Staging DB** database and click **OK**.
27. Click **OK** to apply the settings and close the **Project settings** dialog.

## Apply the common SQL script to the Kofax Insight project databases

The common SQL script contains the data-load operation logic and required data conversion rules. Apply the script using the following steps.

1. Open the script file `<DistributionPackage>/Insight/SQL/Installation_script_Insight.sql` in any text editor or IDE that allows to do file modification.
2. Find all the [PD_data] entries and replace them with [<data_db>] where <data_db> is the actual name of the Data database created in the "Create MS SQL Database" installation step.

3. Find all the [PD_stage] entries and replace them with [<stage_db>] where <stage_db> is the actual name of the Staging database created in the "Create MS SQL Database" installation step.
4. Save changes to the SQL script file.
5. Connect to the MS SQL server where the Kofax Insight project database is located and execute the script file.

# Install the plugin for ReadSoft Invoices

Skip this section if you are not using ReadSoft Invoices on the environment or if another capture solution is used instead of ReadSoft Invoices.

The plugin for ReadSoft Invoices allows to gather capture-related data about documents processed within ReadSoft Invoices modules like Interpret or Verify. The capture-related data will be stored into the Staging database, but you can create a separate database in the MS SQL server if you want to separate the Staging database from the database with capture-related data.

## Install the ReadSoft Invoices plugin

The ReadSoft Invoices plugin should be installed and configured on all systems where ReadSoft Invoices modules are installed and operating. Install the plugin using the following steps.

1. Copy the installation file `<DistributionPackage>/RSI/InvStat2Insight.msi` to any folder on the system where ReadSoft Invoices is installed.
2. Run `InvStat2Insight.msi` installation file.
3. On the welcome screen, click **Next**.
4. Read and accept the End User License Agreement and click **Next**.
5. On the **Destination Folder** screen, specify the destination folder and click **Next**.
6. On the **Update INVOICES Configuration** screen, keep **Update eilocal.ini** and **Update GlobalPath files** options selected and click **Next**.
7. Click **Install** to start installation. Wait until the installation is finished and close the installation program.
8. Start ReadSoft Invoices Manager application.
9. Open the **Plugins** > **Statistics to Kofax Insight** main menu item.
10. On the **Main Configuration** tab, in the configuration dialog, set SAP System ID and SAP Client.
11. Click **Save**.
12. Open the **Remote - MS SQL Connection** tab and specify the database connection settings to the Capture database.

    You can use the Stage database instead if you want to keep capture-related data within the Staging database.

13. Click **Check Connection** to verify the connection settings.
14. Click **OK** to close information dialog.
15. Click **Check Database**.

16. The information dialog stating that the connection is successful appears. Click **Yes** to create the database structure object.
17. Click **OK** to confirm that the database was successfully created.
18. Click **Save** to apply the changes.
19. On the confirmation dialog prompting that the application should be restarted, click **Yes**. The ReadSoft Invoices Manager will be closed.
20. In Windows, start Control Panel and open **Administrative Tools** > **Services**.
21. In the services list, find and select **InvStat2Insight Service** windows service.
22. Click **Stop Service** and wait until the service is stopped.
23. Click **Start Service** and wait until the service is started.

## Install the common SQL scripts on the Capture database

1. Connect to the database that is used for storing capture information.
2. Run `<DistributionPackage>\Insight\SQL\Installation_script_Capture.sql`.

## Optional settings

There are some additional optional settings that you can configure for your analytics project.

### Local SQL Lite database

The InvStat2Insight plugin supports two modes of operation for writing data to the Insight SQL server.

- Asynchronous mode: data is written to the local storage on the local computer, after which Windows Service periodically transfers the data to the Kofax Insight database. It is recommended to use this mode to avoid data loss when network problems occur.
- Synchronous mode: data is written directly to the Kofax Insight database.

To configure the plugin mode perform the following steps.

1. Open the **ReadSoft Invoices Manager**.
2. Log in.
3. Select the menu item **Plugins - Statistics for Kofax Insight**.
4. Select the **Main configuration** tab.
5. Select **Use local Database** check box for asynchronous mode or clear the check box for synchronous mode.
6. Click **Save**.
7. For asynchronous mode, select **Use Local Database**:
    a. The tab **Local - SQLite Connection** will be visible.
    b. Go to the tab **Local - SQLite Connection** and configure where the file will be located in the local storage.
    c. Click **Check Connection** to verify the availability of the temporary database. After the successful verification the **Check Database** button will be available.

   d. It is recommended to click **Check Database** to check the structure of the temporary database.
   e. Click **Save**.
8. For synchronous mode, clear **Use Local Database**:
   a. The tab **Local - SQLite Connection** should become invisible.
9. For the changes to take effect, restart the programs that are a part of ReadSoft Invoices and restart Windows Service **InvStat2Insight.Service** in the **Control Panel** > **Administrative Tools** > **Services**.

## Logging

To configure the plugin logging perform the following steps.

1. Open the **ReadSoft Invoices Manager**.
2. Log in.
3. Select **Plugins - Statistics for Kofax Insight**.
4. Select the **Logging** tab.
5. Select the check boxes for the desired logging level.

| Level | Default | Description |
|---|---|---|
| Debug | | Writes debugging information to the log. (SQL queries, parameters, etc.) |
| Info | | Writes information to the log allowing you to understand the sequence of actions. |
| Warning | X | Writes information to the log about an action that you need to pay attention to (changing plugin configuration settings, etc.). |
| Error | X | Writes information to the log if an error occurred. |
| Fatal | X | Writes information to the log if a fatal error occurred. |

6. For the changes to take effect, restart the programs that are a part of ReadSoft Invoices.

To view logs:

1. Open the **ReadSoft Invoices Manager**.
2. Log in.
3. Select **Plugins - Statistics for Kofax Insight**.
4. Click the **Show logs**.
5. Open the required file, the name of which contains the following format: `yyyy-MM-dd_InvStat2Insight_[name of application].log`.

Chapter 2

# Configure Kofax Analytics for Process Director

This chapter gives you information about configuration tasks and settings needed to maintain and optimize Kofax Analytics for Process Director performance.

## Create a new user

Kofax Analytics for Process Director uses the Kofax Insight User Management functionality to create and maintain users who work with reports. Use the following steps to create new users.

1. Log in to the Kofax Insight Admin Console and right-click on the **Users** node.
2. Select the **New User** context menu item.
3. Enter a name for the new user and click **OK**.
4. Specify user details, password, and security policy.
5. Select the appropriate roles for the user in the **Roles** section.
6. On the toolbar, click **Save**.

Admin Console documentation for more information about user management.

## User roles

The following four roles are available by default.

| Role | Description |
|---|---|
| KAPD - Capture, PD, SAP | Provides access to all reports including Capture, Process Director and SAP data. Use this role is for the case when Kofax Analytics for Process Director is installed together with SAP, Kofax Process Director Accounts Payable, and Capture (e.g. ReadSoft Invoices). |
| KAPD - PD, SAP | Provides access to the reports related to Process Director and SAP but restricts access to the Capture-related reports. Use this role if you don not use Capture solution in your installation. |

| Role | Description |
|---|---|
| KAPD - SAP | Provides access to the SAP-related reports only. Use this role if Kofax Analytics for Process Director is installed on the clean SAP ERP system without Process Director. |
| KAPD - Administration | Provides access to the Administration report where user can change project parameters but restricts access to other reports. Use this role for Administrators. |

# Assign user roles

Kofax Analytics for Process Director provides default roles that can be assigned to a user to access different reports. The role assignment can be performed with the following steps.

1. Log in to the Kofax Insight Admin Console.
2. On the **Documents tree** panel, expand **Users** node and select a user for role assignment.
3. In the **Roles** section, select or deselect the appropriate roles. For information on the available roles, see User roles.
4. On the toolbar, click **Save**

# Change parameters for Kofax Analytics for Process Director

The project parameters can be configured and updated within Kofax Insight Studio or with the prepared report available for Administrators. For information on the available parameters, see User roles.

Use the following steps to change project parameters.

1. Log in to Kofax Analytics for Process Director as Administrator.
2. In the main menu, select **Administration** > **Parameters**.
3. Change the parameter values as appropriate and click **Save**.

If the parameters are changed after the data load into Kofax Insight, then you need to repeat the initial data load to re-calculate metrics that depend on this parameter value. See Import data into Kofax Insight section for instructions how to run the initial data load.

## Correct and valid level interval (days)

The **Correct and valid level interval (days)** parameter defines the number of days for which the current extraction "Correct and Valid" level is specified for the Extraction quality monitor report.

The default value: 1.

## Correct and valid level threshold

The **Correct and valid level threshold** parameter defines the minimum percentage value for the field validation accuracy in the **Extraction quality monitor** report.

If the Correct and Valid level exceeds threshold value, the level indicator in the **Extraction quality monitor** report is green. If the Correct and Valid level is lower than the threshold level, the level indicator is red.

The default value: 0.90.

## Default currency

The **Default currency** parameter specifies the currency for which the metrics will be calculated on the home page.

The default value: EUR.

## Late submit (days)

The **Late submit (days)** parameter defines the number of days between the invoice date and the creation date in ERP/Kofax Process Director Accounts Payable. The invoices for which the difference between these dates exceeds the **Late submit (days)** parameter value will be available in **ERP lead time** parts of the **Payment performance** report. A change of this parameter takes effect after another Data Load.

The default value: 7.

## User workload count threshold

The **User workload count threshold** parameter defines the maximum number of invoices that can be currently assigned to a user. The parameter is applied to the **Current user workload** report.

The default value: 10.

## Change ratio threshold

The **Change ratio threshold** parameter defines the threshold value for the change ratio field in the **Field statistics** report. The change ratio is calculated as a ratio of the number of same fields changed by the operator to the total number of fields.

If the value is greater than or equal to the **Change ratio threshold** value, the value indicator in the **Field statistics** report is red.

If the value is less than the **Change ratio threshold** value, the change ratio for the field is considered acceptable.

The default value: 0.20.

Chapter 3

# Data load

The data load consists of the following steps.

- Extraction data from SAP and Kofax Process Director Accounts Payable into .csv files.
- Starting the Kofax Insight data load execution plan to import data from .csv files and capture-related data into the DATA database.

Since the data load process is sequential, we recommend to prepare the schedule so that the extraction data from SAP and Kofax Process Director Accounts Payable is finished before starting the data load in the Kofax Insight Data Loader.

## Extract data from SAP

The report `/COCKPIT/2INSIGHT` should be used to extract the information about invoices from SAP and Kofax Process Director Accounts Payable.

You can use the `SE38` or `/COCKPIT/2INSIGHT` transaction codes to start the report. The report can be run as a background job at regular intervals like any other SAP program.

In order to schedule the `/COCKPIT/2INSIGHT` report to run as a background job, you should first prepare a variant.

1. Start the `/COCKPIT/2INSIGHT` report using the `SE38` or `/COCKPIT/2INSIGHT` transaction.
2. Enter the values of the report parameters.
   Ensure that the **Save files on client** parameter is not selected.
3. Click **Save** to save the parameter values to a new variant.
4. Enter the **Variant Name** and **Description**.
5. Click **Save** to save the new variant.
   When you created the variant, you can schedule a background job.

### Selection screen parameters

The `/COCKPIT/2INSIGHT` report supports the following parameters.

| Parameter | Description |
| --- | --- |
| Separator | The character that separates values in .csv files. |
| Separator mask | The character to substitute semicolons if they appear in the exported data. |

| Parameter | Description |
|---|---|
| Server file path | The destination directory on the SAP Application Server side where the files are saved.<br>Ideally, the specified path should direct to the same folder that will be used by the Kofax Insight Analytics project to import .csv files, but it can be any other folder.<br>If SAP is installed on UNIX or **Server file path** cannot be shared with theKofax Insight Analytics project, the exported files must be subsequently moved to a location which the Kofax Insight Analytics project has access to. This could be achieved by using a Cron job, for example. |
| Save files on client | Allows to upload files from the server to the client. This parameter can be used only for testing purposes when the report is started manually with the presentation layer (e.g., SAP GUI). |
| Client file path | The destination directory for the file export on the client side when the report is started manually. This parameter works only when **Save files on client** is selected and should be used for testing purposes. |
| Invoices reading packet size | The number of records that will be fetched by the report during a single iteration. |
| Max number of rows in the file | The number of records that will be selected by the report at a single iteration. |
| Date To | The end date for data extraction.<br>This parameter is used only during the first report run. After that `/COCKPIT/2INSIGHT` will store date of the latest run and will use the stored values for any subsequent runs. |
| Time To | The end time for data extraction.<br>This parameter relates to Date To parameter and in summary both parameters allow to specify the end date and time for data load.<br>This parameter is used only during the first report run. After that `/COCKPIT/2INSIGHT` will store time of the latest run and will use stored values for any subsequent runs. |
| Days back for ini load | The number of days before the end date specified for Date To to be used as the start date of the data load.<br>For example, if **Date To** value is 30 January 2021 and **Days back for ini load** is 20, then the start date will be 10 January 2021. As a result, `/COCKPIT/2INSIGHT` will extract the data created or updated between 10 January 2021 and 30 January 2021. |
| Company Code | The company code selection criteria. The empty value allows to export data for all company codes. |

| Parameter | Description |
| --- | --- |
| PDAP doc type | The Kofax Process Director Accounts Payable document type selection criteria. The empty value allows to export data for all Kofax Process Director Accounts Payable document types. |

# Import data into Kofax Insight

It is required to import data into the Kofax Insight Analytics project to load or update information about invoices into the DATA database. The import procedure consists of the two steps:

- The initial data load that should be executed manually one time after the installation of the Analytics project. The initial data load is required for loading data into the empty DATA database.
- Subsequent data loads that should be scheduled for periodical execution. A subsequent data load is required to update existing data within the DATA database with information about new processed invoices on the Capture, SAP and Kofax Process Director Accounts Payable side.

## Initial data load

Use the following steps to start the initial data load.

1. Start the Kofax Insight Data Loader.
2. On the **Documents tree** panel, select **Data Load Module**.
3. On the **Date range** tab, select "AnalyticsForSapExecutionPlan".
4. Set **From date** value to "Beginning of times...".
5. Set **To date** value to "Current time".
6. Select **Save "To date" as the date of last successful load** check box.
7. Click **Run plan** to start the initial data load.

## Subsequent data load

Use the following steps to schedule subsequent data load.

1. Start the Kofax Insight Data Loader.
2. On the **Documents tree** panel, select **Analytics for PD** project and click **Execution plans**.
3. Find the plan with the name **AnalyticsForSapExecutionPlan** and click the ellipsis button located in the **FREQUENCY** column.
4. Set **Data load type** to "On-going data load".
5. Set **Schedule** parameters for periodic run. For example, use **Every day at specific time** parameter.
6. Set **From date** to the "Last successful load date" value.
7. Set **To date** to the "Current time" value.

8. Click **OK** to apply the changes and schedule the subsequent data load.

   See the Kofax Insight documentation about the Data Loader functionality and scheduling the execution plans.

Chapter 4

# Project customization

## Supporting another capture solution

By default, Kofax Analytics for Process Director supports ReadSoft Invoices as the Capture solution.

To support another Capture-related solution (e.g. Kofax TotalAgility) you need to redefine SQL view objects "DocumentField" and "VerifiedDocument" with your own capture-related data. The SQL script for view objects creation is in the following file:

```
<DistributionPackage>\Insight\SQL\Installation_script_Capture.sql
```

The information about view objects and fields in the two following topics.

### DocumentField view

The **DocumentField** view provides the information about the final document field state during the of invoice transfer to Process Director.

**View fields**

| Field name | Type | Description |
| --- | --- | --- |
| User | varchar(128) | The name of a user who transfers a document to PDAP |
| InvoiceType | int | The invoice type: 0 - Debit, 1 - Credit |
| InvoiceTypeName | varchar(6) | The invoice type name: Debit, Credit |
| Vendor | varchar(128) | The name of the vendor from the invoice |
| VendorNumber | varchar(136) | The number of the vendor including SAP SYSID and CLIENT |
| Organization | varchar(128) | The invoice Company Code description |
| OrganizationNumber | varchar(136) | The company code on the invoice including SAP SYSID and CLIENT |
| FieldName | varchar(50) | Field from capture |

| Field name | Type | Description |
|---|---|---|
| TableName | varchar(6) | The field table location (e.g. "Header" or "Lines") on the Capture side |
| IsValid | bit | The flag that indicates that the field is valid |
| IsChanged | bit | The flag that indicates that the field was changed during processing on the Capture side |
| MINUTE_START | datetime | The date and time when the parent invoice was transferred to PDAP. |

## VerifiedDocument view

The **VerifiedDocument** view provides the information about the document validation results.

**View fields**

| Field name | Type | Description |
|---|---|---|
| User | varchar(128) | The name of a user who performed the invoice validation |
| VerifyTime | datetime | The date and time when the invoice was validated |
| InvoiceType | int | The invoice type: 0 - Debit, 1 - Credit |
| InvoiceTypeName | varchar(6) | The invoice type name: Debit, Credit |
| Vendor | varchar(128) | Name of the vendor from the invoice |
| VendorNumber | varchar(136) | The vendor number including SAP SYSID and CLIENT |
| Organization | varchar(128) | The invoice Company Code description |
| OrganizationNumber | varchar(136) | The company code on the invoice including SAP SYSID and CLIENT |

# Customization for `/COCKPIT/2INSIGHT` report

The following Process Director user exits can be used for customization of the data that should be extracted to .csv files.

- **User-Exit 450**: Kofax Analytics extract, change PDAP data.

  Allows to modify PDAP data during the extraction.

  The default template: `/COCKPIT/USEX_IA_PDAP_GET`.

- **User-Exit 451**: Kofax Analytics extract, change FI data.
  Allows to modify SAP FI documents data during the extraction.
  The default template: `/COCKPIT/USEX_IA_FI_GET`.
- **User-Exit 452**: Kofax Analytics extract, change MM data.
  Allows to modify SAP MM documents data during the extraction.
  The default template: `/COCKPIT/USEX_IA_MM_GET`.

Additionally, the set of fields that should be extracted by `/COCKPIT/2INSIGHT` can be extended with Z-structures that can be added into the CI_SIA_HDR Customizing Include. Please note, that you need to make changes into the Kofax Insight Analytics project to support the new custom fields.