Kofax Analytics for RPA

Administrator's Guide

Version: 2.0.0

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KOFAX

Table of Contents

Preface

This guide includes instructions for installing and using Kofax Analytics for RPA. Read this guide completely before using the software. The guide is written with the assumption that you have a basic understanding of Kofax RPA and Kofax Insight.

Related documentation

The Kofax Analytics for RPA product documentation, including the release notes, is hosted online:

https://docshield.kofax.com/Portal/Products/RPA/10.5.0_vx4he5v1hz/RPA.htm

Be sure to review the release notes document, which contains information that is not available in other Kofax Analytics for RPA documentation.

Offline documentation

If the security policy for your organization restricts Internet access, you can view the documentation in offline mode (without an active Internet connection) while working with Kofax Analytics for RPA. You can open the *Kofax Analytics for RPA Administrator's Guide* directly from the Start menu.

Start > **All Programs** > **Kofax RPA <version>** > **Documentation**

Kofax Insight documentation

This version of Kofax Analytics for RPA requires Kofax Insight 6.1 or later. The Kofax Insight documentation site is available here:

http://docshield.kofax.com/Portal/Products/Insight/600-j3y2jmmw57/Insight.htm

Training

Kofax offers both classroom and computer-based training to help you make the most of your Kofax Analytics for RPA solution. Visit the Kofax website at www.kofax.com for details about the available training options and schedules.

Getting help for Kofax products

Kofax regularly updates the Kofax Support site with the latest information about Kofax products.

To access some resources, you must have a valid Support Agreement with an authorized Kofax Reseller/Partner or with Kofax directly.

Use the tools that Kofax provides for researching and identifying issues. For example, use the Kofax Support site to search for answers about messages, keywords, and product issues. To access the Kofax Support page, go to www.kofax.com/support.

The Kofax Support page provides:

- Product information and release news

  Click a product family, select a product, and select a version number.
- Downloadable product documentation

  Click a product family, select a product, and click **Documentation**.
- Access to product knowledge bases

  Click **Knowledge Base**.
- Access to the Kofax Customer Portal (for eligible customers)

  Click **Account Management** and log in.

  To optimize your use of the portal, go to the Kofax Customer Portal login page and click the link to open the *Guide to the Kofax Support Portal*. This guide describes how to access the support site, what to do before contacting the support team, how to open a new case or view an open case, and what information to collect before opening a case.
- Access to support tools

  Click **Tools** and select the tool to use.
- Information about the support commitment for Kofax products

  Click **Support Details** and select **Kofax Support Commitment**.

Use these tools to find answers to questions that you have, to learn about new functionality, and to research possible solutions to current issues.

Chapter 1

Introduction

Kofax Analytics for RPA is an extension of Kofax RPA that produces a graphical business intelligence dashboard based on data collected while Kofax RPA robots and Process Discovery agents are working.

Kofax Analytics for RPA views are based on values from predefined Kofax records and metrics. When using the Dashboard Designer within Insight Studio to add custom views, do not modify the predefined views, records, or metrics that come with the product. You can make a copy of existing views and then customize the settings. For details, see the *Kofax Analytics Project Customizations Application Note* on the Kofax website.

System requirements

For information on supported operating systems and other system requirements, see the *Kofax RPA Technical Specifications* document on the Kofax RPA support pages on the Kofax website.

Kofax Analytics for RPA requires Kofax Insight 6.1 or later.

Time zone settings

For correct display of data in the Kofax Analytics for RPA Dashboard, make sure Java correctly sets the time according to your time zone on RoboServers and computers running Management Consoles. See the *Timezone Data Versions in the JRE Software* on the Oracle web site for the latest updates in time zones. If necessary, use the Orale *Timezone Updater Tool* to update the time zone information.

Chapter 2

Install and Configure Kofax Analytics for RPA

Follow the instructions in this chapter to perform a new Kofax Analytics for RPA 2.0.0 installation.

If you are upgrading from Kofax Analytics for Kapow 1.0, see Upgrade from the previous version.

Your Kofax Analytics for RPA product includes `Kofax_RPA_KAFRPA_2.0.<version>_.zip`, the project bundle file required to successfully import RPA components and built-in views.

SSL

If you initially perform the Kofax Analytics for RPA installation without SSL, you can switch to SSL later. You can switch to SSL by reinstalling Kofax Insight (with the "Use Existing Database" option).

Installation and Configuration Checklist

The following checklist provides an overview of steps necessary to set up Kofax Analytics for RPA.

1. Check settings and set up if necessary the following parameters in Kofax RPA. The settings are located on the **Admin** > **Settings** tab in Kofax RPA Management Console.

   For robot-run analytics

   - RoboServer Log Database: Select **Log to Database** and specify database parameters.
   - Analytics Database: Select **Log the statistics to Analytics Database** and specify database parameters.
   - Kofax Insight Dashboards: Select **Allow Dashboards** and specify the URL of the Insight server as follows `http://<insighthost>/Insight/View`
   - Single sign-on: Select **Use Single Sign-On** and specify database parameters if you plan to use HTTP request authentication.

   For Process Discovery analytics

   - Perform the following steps to set up and configure Kofax RPA Process Discovery.
     a. Configure the Management Console.
     b. Depending on your environment, perform one of following:
        - Deploy Analyzer using Docker.
        - Deploy Analyzer manually on Windows.
        - Deploy Analyzer manually on Linux.
     c. Deploy Process Discovery agents.

   See the "Kofax RPA Process Discovery" chapter in the *Kofax RPA Administrator's Guide*.

2. Create and configure Insight databases: admin, metadata, data, and SSO. See the "Databases" topic below.
3. Install Kofax Insight.
4. Import and configure your project.
5. Set up Kofax RPA Kapplets to connect to dashboard.

Databases

Use a new or existing database management system instance to create the following databases for use with Kofax Analytics for RPA:

- Metadata: Stores configuration information such as metric definitions and calculation logic. Assign a name such as `rpa_analytics_meta`.
- Data: Stores the processed records and metrics. You can assign any name, such as `rpa_analytics_data`.
- Admin: Stores Insight administrative data related to users, roles, filtering, alerts, logs, and more. Assign a name such as `rpa_analytics_admin`.
- `SSO`: Stores information required for using the HTTP Request Authentication. Assign a name such as `rpa_analytics_sso`.

We recommend that you use a consistent naming convention for each database, such as rpa_analytics_admin, rpa_analytics_meta, and rpa_analytics_data.

Important Please create and maintain all the Kofax RPA product databases according to the recommendations in the product documentation. If you are considering database modifications or customizations, do not proceed without consulting Kofax; otherwise, the results are unpredictable and the software may become inoperable.

For the Oracle database, all database schemas must already be in place before you proceed with the product installation.

Note If you use Oracle database for collecting analytics data in Kofax RPA and specify the same database while upgrading to a new version of Kofax RPA, you must manually drop and create tables in the database. See the "RoboServer Log Database" and "Scripts for Creating Database Tables" topics in Kofax RPA help for information on creating database tables.

Install Kofax Insight

Kofax Insight produces a graphical business intelligence dashboard based on robot-run data and data collected by Kofax RPA Process Discovery agents.

For more detailed installation instructions, see the *Kofax Insight Installation Guide*.

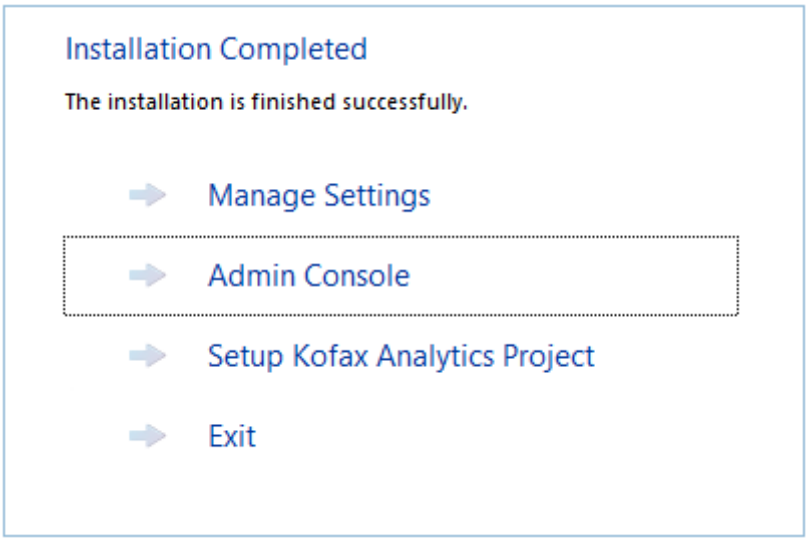
Important Before starting the Insight installation process, install MySQL Connector/NET on the computer running Kofax Insight. You can download MySQL Connector/NET from the MySQL website.

1. Run the Kofax Insight installation file, such as `KofaxInsightSetup_6.1.0.0.0.1838_x64.msi`. The Insight build number is listed in the "Version information" section of the *Kofax Insight Release Notes*. Install Kofax Insight using the default options.
   When the installation wizard is complete, the **Completed the Kofax Insight Setup Wizard** window appears.
2. Click **Finish**. The Insight Installation Manager is started. If you clear the **Launch Insight Installation Manager** option before clicking **Finish**, you can start the Installation Manager later from the Start menu.

   The Installation Manager continues the installation process and helps you set up and configure Kofax Insight, such as the Insight admin database and other parameters. See the *Kofax Insight Installation Guide* for details.

Once the Insight installation is complete, the final screen of the Insight Installation Manager provides several options:



To set up the dashboard project, click **Admin Console** and continue to the next section.

Import and configure your project

Use this procedure to set up your Kofax Analytics for RPA dashboard project.

Note that by default Insight sets up HTTP Request authentication (SSO) for your project. You can change the type of authentication later.

1. Start Insight Admin Console.
   - If you have not closed the Insight Installation Manager, on the Installation Completed window, click **Admin Console**.
   - If you closed the Insight Installation Manager, navigate to **Start** > **All Programs** > **Insight** > **Admin Console**.
2. Enter the login credentials for the Administrator that you specified during the Insight installation.
   If this is the first time you start the Admin Console, you are prompted to enter license information on the **License** tab.
3. In the navigation panel, click **Projects**, and then right-click and select **New Project**.
   The **New Project** window appears.
4. Type `Kofax_RPA` as the project name and click **OK**.
   The **Create New Project [Kofax_RPA]** window appears.
5. Click the **Import from file** tab, and then click **Select file**. Select **File is located on the client computer and will be copied to the server for processing**.
   The **File Upload** window appears.
6. Navigate to the `Kofax_RPA_KAFRPA_2.0.<version>_.zip` file, and click **Open**.
   Wait until the file is imported.
7. Set the database connection information for the Meta and Data databases.
   The database name field is automatically pre-filled with the project name and a database ending, such as `Kofax_RPA_meta`. Edit the name to suit your requirements. Note that the database name must not contain spaces.

   Tip If the server details are nearly the same for the Meta and Data databases, select **Same server as the meta database** to copy the entries from the **Meta** section into the **Data** section. After the entries are copied, be sure to update the database name in the **Data** section.
   Do not click **Connect** during this step, because the databases do not exist yet.
8. Click **OK** to import the project.
9. When prompted to confirm database creation, click **Yes** even if databases already exist. Insight creates the necessary tables in the database.
   An indicator appears on the screen while the project import is in progress.
   The built-in views, records, and metrics for Kofax Analytics for RPA are added to your installation.
10. When the import is complete, click **Open Admin Console**.
11. Expand the newly created project and verify that you have the following databases under **Data Sources**:
    - **Data DB**: Insight data warehouse
    - **Analytics**: Reporting database that you have configured in Kofax RPA
    - **Logs**: Log database that you have configured in Kofax RPA

- **erd_dean**: Process Discovery database

To expand the project, click the arrow to the right of the project name.

12. Set parameters to connect to each of the databases by specifying the Server name, Database name, User and password. Click **Connect** to test the connection. The circular indicator turns green if the connection is successful.

    Note The analyzer database is set in the Kofax RPA Management Console on the **Admin** > **Settings** tab. Click **Process Discovery Analyzer** on the left of the **Settings** tab to see the database settings.

13. Click **Save** to save your configuration.
14. Expand **Users** and set passwords for the built-in users that can access Kofax Analytics for RPA Viewer directly to view the reports. Click **Save** to save passwords. The following users are available:
    - **KAFK**: This user can access both Process Discovery and RPA dashboards.
    - **RPA**: This user can access only the RPA dashboard.
    - **PD**: This user can only access the Process Discovery dashboard.
    - **KAFK_admin**: This user is preserved for backward compatibility with version 1.0 and has similar rights as the Administrator.
15. Open Insight Studio by clicking **Studio** from the Insight Admin Console, or open a web browser and enter the following URL:
    `http://<server>/Insight/Studio/`
16. Expand **Execution Plans** and click **Minute Plan** for the imported Kofax Analytics for RPA project.
    This plan is scheduled to load data every five minutes.
17. Click **Data Load** and do the following on the **Date range** tab:
    a. Select today's date and select tomorrow's date to load and show data gathered today.
    b. Click **Load Data**.
       To load data collected during previous days, load data day by day instead of loading the entire time period. Loading data for more than one day increases the load and may prevent the program from loading data.

Once configuration is complete, you can start using the dashboard.

Set up Kofax RPA Kapplets to connect to dashboard

After you import and configure your project, open your Kofax RPA Kapplets, where the Main Navigation menu should contain the NEW DASHBOARD item. To create a new Kapplet with a connection to the Kofax Analytics for RPA Dashboard, click **NEW DASHBOARD** and specify necessary parameters. See the **Connecting to Kofax Analytics for RPA Dashboards** topic in the Kofax RPA Help for more details.

Upgrade from the previous version

Kofax Analytics for RPA is designed to use Kofax Insight 6.1 or later.

This is the recommended way of upgrading your Kofax Analytics version 1.0. Kofax Analytics for RPA 2.0 contains the same robot-run reports as version 1.0 and the built-in users are preserved for accessibility reasons.

1. Download a new version of Kofax Insight and upgrade your copy of Kofax Insight.
2. Import and configure Kofax Analytics for RPA 2.0 project.

   After you complete the import procedure, you can view the Kofax Analytics for RPA 2.0 reports the same way as in version 1.0.

   Note To load data collected during previous time, load data day by day instead of loading the entire time period. Loading data for more than one day increases the load and may prevent the program from loading data.

For more information, see "Upgrade Insight" chapter in the *Kofax Insight Installation Guide*. You can also consult Kofax support before performing an upgrade.

Windows Authentication

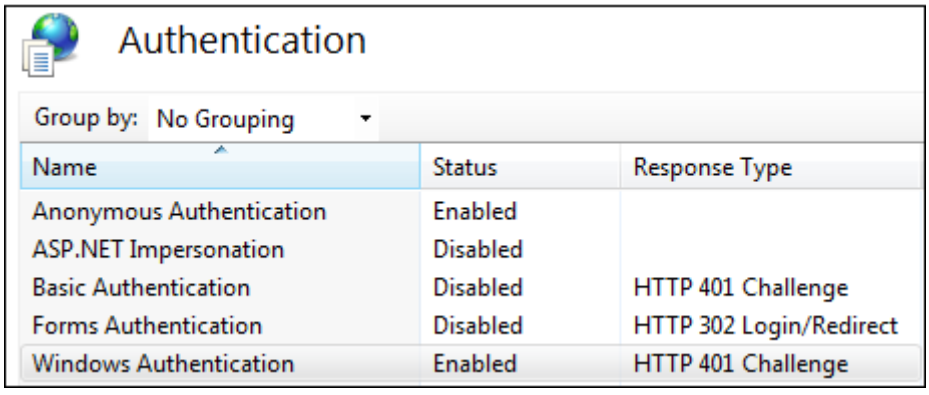
If you are using Windows user authentication, access to all Kofax Analytics for RPA databases must be given to the following:

1. User account used to perform the Kofax Analytics for RPA installation
2. Account/identity for the IIS application pool
3. Account/identity for the Insight Scheduler service

Configure Insight for Windows Authentication

Use the procedure in this section to configure Kofax Insight for Windows Authentication.

Before configuring Insight, select Windows authentication in IIS for the web application (default website).



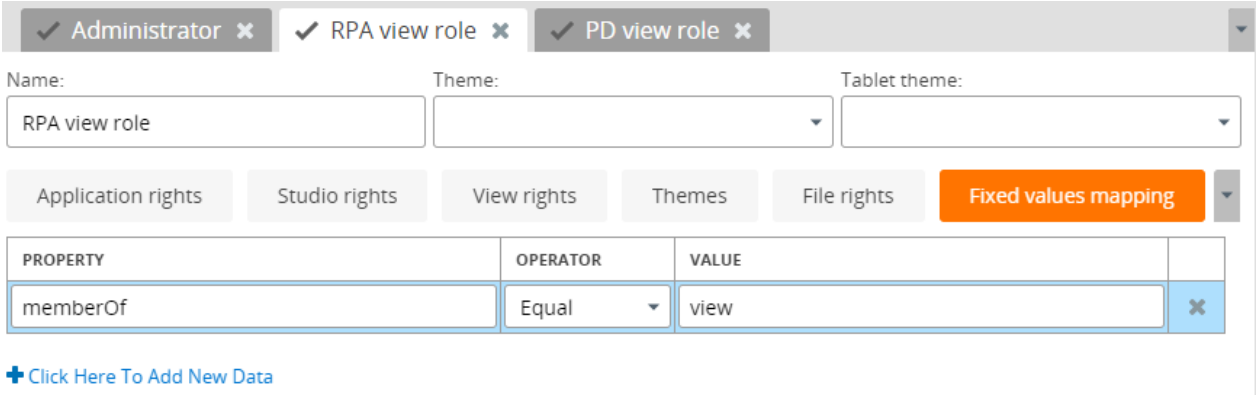
1. Navigate to **Start** > **All Programs** > **Insight** > **Administration** > **Admin Console**.
2. In the navigation panel, click **Authentication**.

3. Click the **Authentication Method** tab and select the following:
   a. **User properties are obtained from the environment: Windows**
   b. **And then user roles and access rights are determined by comparing these values to**: **Fixed values**
4. **User identifier**: Specify a way to get the user's ID. The ID should be constant for a specific user's login. Usually, it is a session property (Identity) that looks to the Active Directory domain and user name.
   a. In the navigation panel, click **User mapping**.
   b. On the **User Mapping** tab for User Identifier (UID), set the "Session property" to **Identity**.
5. Set session properties for **User Name** and **Email**.
   a. On the **User Mapping** tab for **User Name**, set the "Session property" to **FullName**.
   User Name is the display name of a user account. Usually, it is one of the Active Directory properties, such as *Identity*, *name*, *FullName*, *displayName* or another convenient property. Your Domain Admin can provide all available Active Directory properties.
   b. On the User Mapping tab for Email, set the "Session property" to **EmailAddress**.
   Email is the email address of the user account. It is used for self-subscriptions only. Usually, it is the Active Directory property *mail* or *EmailAddress*. Your Domain Admin can provide you with all available Active Directory properties.

Mapping Roles

Roles define a set of predefined Admin settings such as the theme, date format, etc. Also, roles define specific access rights to projects and dashboard views. It's necessary to describe mapping rules for each role. Usually, the Active Directory property *memberOf* is used. In the sample illustration, users with the Active Directory property *memberOf*, including the *admin*, are assigned to the KAFK admin role. Your Domain Admin can provide you with all available Active Directory properties.

Each row in the mapping grid uses the **AND** operand. If multiple roles on the Roles list match conditions for a user account, the access rights are merged from all matching roles, while other settings (such as the theme or date format) are assigned by the top matching role on the list.



Set Up HTTP Request Authentication

HTTP Request Authentication is the default type of authentication used by Insight. Perform the following steps to authenticate Kofax Analytics for RPA users as Insight users.

1. In Kofax RPA Management Console, go to **Admin** > **Settings**.
   a. Select **Kofax Insight Dashboards** in the left pane, click **Allow Dashboards** and specify the Insight server URL.
   b. Select **Single Sign-On**, click **Use Single Sign-On** and specify a Single Sign-On database to be used by Kofax Insight.
2. Navigate to **Start** > **All Programs** > **Insight** > **Administration** > **Admin Console**.
   The **Insight Admin Console** page appears.
3. Enter login information and click **OK**.

   Note The default user name is *Administrator*, which uses the password you specified during Insight installation.

4. On the navigation panel, click **Authentication**.
   a. Click **HTTP Request** and **External database**.
   b. Select **Use Insight users for login to the Studio**.
5. On the navigation panel, click and expand **Connections**.
   Verify that **SSOConnection** is selected.
6. In the **Connection Option** group, complete the entries as applicable to your SSO database that you set up in the Kofax RPA Management Console.
7. On the navigation panel, click and expand **User mapping**.
   a. Select **Use User Name** under **User Identifier (UID)**.
   b. Under **User Name**, select **Deny authentication for users with undefined name**, click **Database Query** and select **SSOConnection** from the **Source** list.
   c. Select the database type you use in the **Database** list and specify the following SQL query.
   ```
   select USERNAME from ALTOSOFT_SESSION where SESSION = '<session_id>'
   ```
8. Click **Save**.
9. On the navigation panel, click and expand **Roles**.
   You should see four predefined roles:
   - **Administrator role**
   - **Kafka view role**
   - **RPA view role**
   - **PD view role**
10. If you changed predefined role settings, click **Save**.

Chapter 3

Use Kofax Analytics for RPA

With Kofax Analytics for RPA, you can view the data retrieved from your Log and Analytics databases in an interactive dashboard through the Viewer.

The Kofax Analytics for RPA dashboard consists of several views included in your installation. Each view has graphical elements and other components to analyze data in your Kofax RPA database.

Viewer

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

Note that Viewer data is updated every five minutes.

Open the Viewer

Depending on the authentication method, the procedure for opening the Viewer may vary. Follow the procedure in this section, depending on the authentication type.

Note The recommended monitor resolution is 1280x1024.

Insight Users Authentication

Do one of the following to open the Viewer:

- Navigate to **Start** > **All Programs** > **Insight** > **Viewer**.
- Open a web browser and enter the following URL:

  `http://<server>/Insight/View/`

  where `<server>` is the name of your server.

  A login window appears. Enter one of the user names (KAFK, RPA, or PD) and a password set for this user in the Insight Studio. Click **Login**. Note that only one of the abovementioned users can access the Viewer directly. See Import and configure your project for user configuration details.

  Note Be sure to verify that the website's binding host name is set to blank or localhost in your IIS settings. Otherwise, a login error may occur.

To ensure proper viewing, verify the proper Authentication Method setting in Insight Admin Console. The "No authentication" setting is not supported and may produce errors or unexpected results in the browser window. For details, see Import and configure your project.

Also, if Main is not selected as the default view for the role associated with the user who is logging in, the following error may appear:

```
You can specify view name parameter in Admin Tool
```

Resolve the issue by setting Main as the default view.

Windows Users Authentication

Do one of the following to open the Viewer:

- Navigate to **Start** > **All Programs** > **Insight** > **Viewer**.
- Open a web browser and enter the following URL:

  `http://<server>/Insight/View/`

  where `<server>` is the name of your server

  Be sure to verify that the website's binding host name is set to blank or localhost in your IIS settings. Otherwise, a login error may occur.

HTTP Request Authentication (SSO)

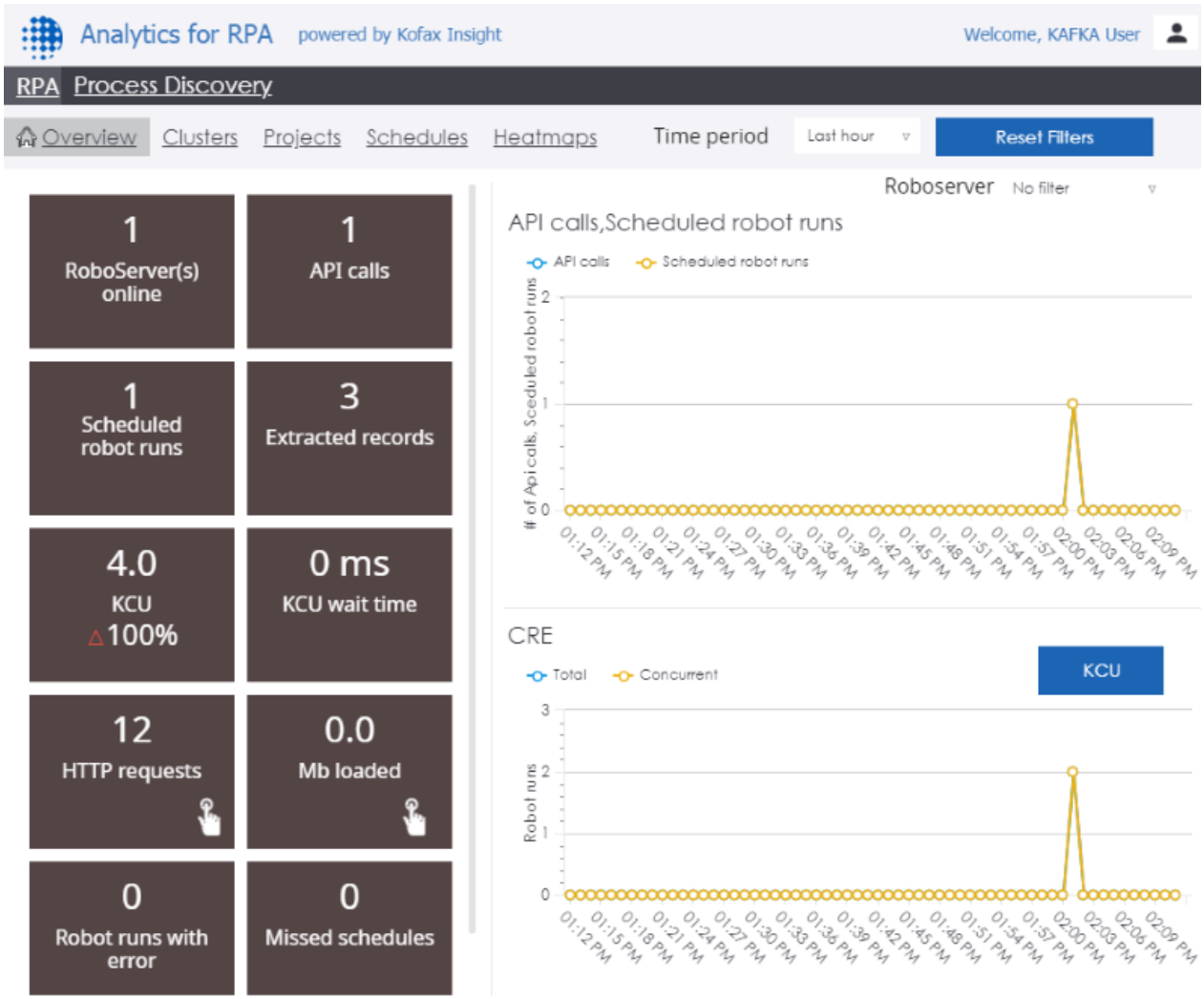
After you set up the HTTP request authentication and create a Kapplet with a connection to the Kofax Analytics for RPA, open your Kapplets and click **Open** in the Kapplet that connects to Kofax Analytics for RPA Dashboards.

See the Kofax RPA help for details.

Viewer screen layout and navigation

Toolbar Menu Use the menu to access different views, such as **RPA** and **Process Discovery** as well as different reports in the selected view. Use additional user-level items to bookmark frequently used views and log out.
Context Menus and Chart Options Right-click a chart or grid to access more options such as Reset, Pivot, Zoom in, View, and Metric grid format. The options vary, based on the chart type or area where you right-click.

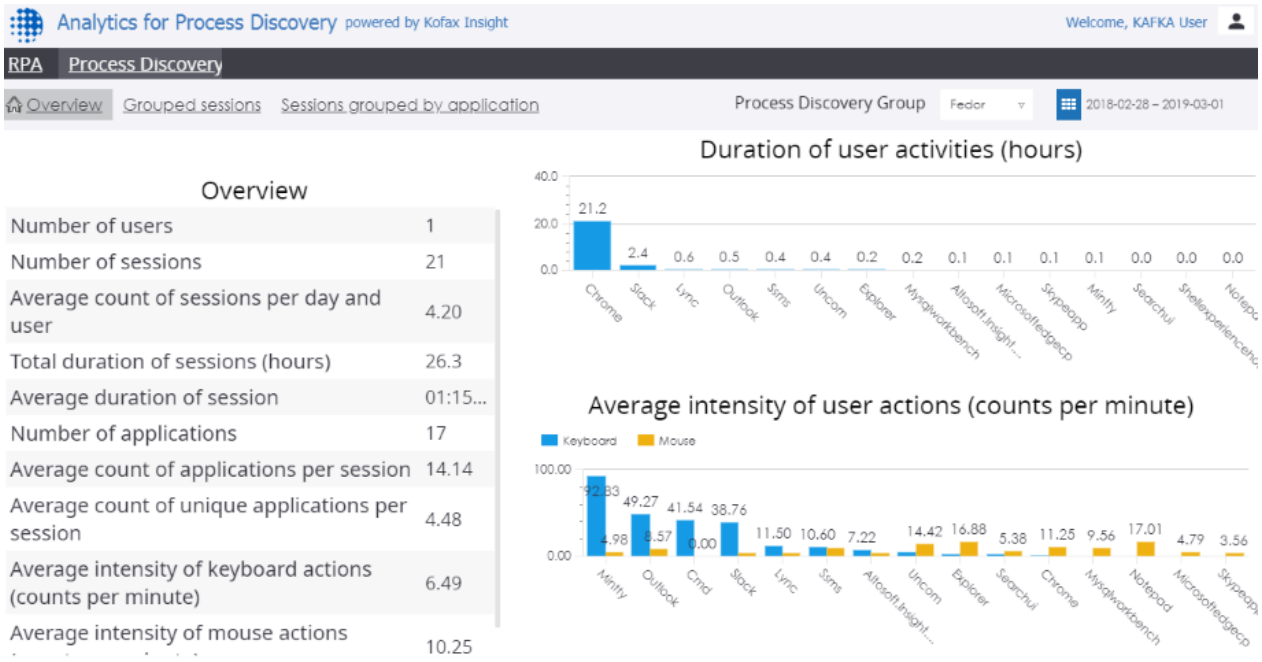
RPA views



RPA view filters

You can filter the reports by the time in the **Time Period** list and by Roboservers where robots run in the **Roboserver** list.

Process Discovery views



Process Discovery filter input

Filter the results by Process Discovery group name and date.

Select a group name in the **Process Discovery Group** list. If you select **No filter**, information for all groups is displayed in the view.

Use the Viewer

While working with the Viewer, you can do the following:

- Click any Project, Robot, or Schedule name in the list to drill down to activity details.
- Manipulate and interact with any component on the dashboard.
- Hover over a point in a graph to view details.
- Double-click any graph name to expand it to full browser window.
- Click and drag to the side any graph name to switch to the list view and back.
- Select the period for the statistics in the **Time Period** list.
- To restore default values in filters, click **Reset Filters**.

Export to Excel

On any grid with Export to Excel functionality, you can set preferences for exporting the content of the grid to Microsoft Excel.

1. On a grid with **Export to Excel** enabled, click **Export to Excel**.
   The **Export to Excel** window appears.

2. Select an **Export content** option:
   - **Current page and top drill down**
   - **All pages of a grid. top drill down level. Could take some time.**
   - **All pages of a grid, all drill down levels. Could take much longer.**
3. Select an **Export format** option:
   - **Unformatted XML file, readable by Excel**
   - **Formatted Excel file**
   - **Unformatted CSV file**
   - **Unformatted TSV file**
4. Optionally select **Enabled** to use a flat export, which retains granular details for drill down or expandable data.
5. Click **OK** and when prompted, save or open the .xml file.

Kofax Analytics for RPA views

This section gives you information about each view provided in your Kofax Analytics for RPA project. You can interact with and manipulate different objects on the view to get detailed information. Kofax Analytics for RPA provides RPA views and Process Discovery views.

RPA views

RPA views provide Kofax RPA analytics information.

- Overview
- Clusters
- Projects
- Schedules
- Heatmaps

Overview

The Overview provides a graphical representation of Kofax RPA system performance parameters, so that you can quickly see capacity bottlenecks or system utilization issues. You can filter the data by selecting a period in the **Time period** list and selecting a Roboserver in the **Roboserver** list. The percentage on tiles shows a difference between the selected period and the same period preceding the selected one. For example, if you select "Last hour" as the time period, the percentage shows the difference between the last hour and an hour preceding it. Note the triangle next to the value points down if the value decreased and points up if the value increased.

- For API Calls, Scheduled runs, Extracted records, HTTP requests, and Mb loaded: The percentage is green if the value is more than zero, indicating the value has increased.
- For KCU, KCU wait time, Robot runs with errors, and Missed schedules: The percentage is green if the value is less than zero, indicating the value has decreased.
- The CRE graph shows the total number of executed robots and the number of robots that were executed concurrently on a Kofax RPA RoboServer.

Click a tile with this symbol to view network details.

KCU Health

KCU Health is calculated based on two metrics: one for API calls and one for Schedules.

The KCU health for API calls is calculated based on KCU wait time from robot runs.

- The KCU health becomes Yellow if the maximum KCU wait time for a robot run is more than one second.
- The KCU health becomes Red if the average KCU wait time for a robot run is more than one second.

The KCU health for schedules is drawn from the statistics as follows: zero base is 2 seconds per minute, and the peak limit is 10 seconds per minute.

- The KCU health becomes Yellow if 10% of the data points have a KCU wait that exceeds the peak limit, or if 50% of the data points have a KCU wait that exceeds the zero base.
- The KCU health becomes Red if 50% of data points have KCU wait that exceeds the peak limit, or if 90% of data points have a KCU wait that exceeds the zero base.

Clusters

This view provides a graphical representation of Kofax RPA system performance parameters on a cluster level. The CPU and Memory graphs show average usage for all RoboServers in a cluster.

RoboServer names change color depending on the last activity as follows.

- Green: If the value is greater than 60 seconds.
- Orange: If the value is greater than or equal to 60 seconds, and less than 5 minutes.
- Red: If the value is greater than or equal to 5 minutes, and less than 1 day.
- Gray: If the value is greater than or equal to 1 day.

You can filter the results by selecting a RoboServer in the list. When you select a RoboServer, the CPU and Memory graphs show minimum, maximum and average usage.

Projects

This view provides an overview of robot health in your projects by displaying a graphical presentation of key robot-run metrics. You can identify and fix robots that are not performing as expected.

Robot Health and Color

Robot health is calculated based on three values: errors count, execution time, and extracted records. For each robot run for a selected period, a mean and deviation is calculated. If all values fall into mean plus/minus deviation, the robot run is Green. Otherwise, the robot run becomes Red.

If all robot runs of a robot are Green, the robot health is Green. If one or more, but not all robot runs are Red, the robot health is Yellow. If all robot runs are Red, the robot health is shown as Red.

Schedules

This view provides a graphical presentation of the number of concurrent schedule runs, which offers an overview of the load distribution on your system.

To see the details of a Schedule run, select a schedule and click **Details** in the **Schedules** pane. You should see the Schedules details window described below.

Schedule Health and Color

Schedule health is calculated based on three values: error count, execution time, and extracted records. For each schedule run for a selected period, a mean and deviation is calculated. If all values fall into mean plus/minus the deviation, the schedule run is Green. Otherwise the schedule run becomes Red. Each schedule health is based on runs of this schedule.

If all schedule runs of a schedule are Green, the schedule health is Green. If one or more, but not all schedule runs are Red, the schedule health is Yellow. If all schedule runs are Red, the schedule health is shown as Red.

Heatmaps

RPA dashboard provides color-coded heatmaps for robot runs and schedule runs. The red limit value for a heatmap is specified in the **Enter red limit for number of** option above the report. When you hover your mouse over the report, the number of runs appears in cells. The following colors are available.

Color	Value
Red	Above the specified limit
Orange	Above three-quarters and up to the specified limit
Yellow	Above half and up to three-quarters of the specified limit
Green	Up to the half of the specified limit

Process Discovery views

Process Discovery views are reports with information based on data collected by the Process Discovery agents.

The following reports are available in the Process Discovery views.

View	Description
Overview	Provides a summary of all data gathered by agents to the specified database.
Grouped sessions[1]	Shows duration of sessions in hours drilled down by applications present in each session.
Sessions grouped by application	Shows duration of sessions (in hours) containing the selected application.

[1] A session represents a user activity period. A session starts when an agent starts receiving user actions. If an agent does not receive any actions during the specified time, the session is marked as complete. A new session is opened the next time the agent records a user action. An interval between the end of one session and the beginning of a new one is specified for each group in **Analytics advanced settings** on the **Admin** > **Settings** tab in the Kofax RPA Management Console.