

# **Kofax Analytics for TotalAgility** 1.0.0

## Product Features Guide



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# Preface

This guide gives an overview of the dashboards made available in Kofax Analytics for TotalAgility. These dashboards will help you track data through the workflow, analyze the effectiveness of the processes, resources and address business problems.

Use this guide to become familiar with the product features. This information can help you decide which features are important to the business challenges you face and which features best suit your company's needs.

## Who Should Read This Guide

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

Business owners who are planning to implement Kofax TotalAgility and Kofax Transformation Modules especially if they serve in the following roles:

- Executives
- Finance managers
- Project managers
- Business professionals who help decide the effectiveness of the workflow and health of the organization

## Related Documentation

In addition to this guide, the Kofax Analytics for TotalAgility documentation set includes the following:

### ***Kofax Analytics for TotalAgility Administrator's Guide***

Includes installation and product configuration instructions, step-by-step details on how to define projects, users, and roles, and an explanation of why you need them. Chart and grid descriptions are included, along with information about how to use them to gain visibility into real-time information related to your projects. Learn how to use predefined views to analyze your business processes and operational efficiencies to see if your business is on track or needs corrective action.

### ***Kofax Analytics for TotalAgility Release Notes***

Late-breaking product information is available from release notes. The release notes contain information that may not be included in other Kofax Analytics for TotalAgility documentation. The release notes are available to view or download on the Kofax website at [www.kofax.com](http://www.kofax.com).

## Training

Kofax offers both classroom and computer-based training to help you make the most of your Kofax Analytics for TotalAgility solution. Visit the Kofax website at [www.kofax.com](http://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 and messages, keywords, and product issues. To access the Kofax Support page, go to <http://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.
- 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.

**Note** To optimize your use of the support 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.

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# About Kofax Analytics for TotalAgility

Kofax Analytics for TotalAgility is an extension of Kofax TotalAgility that tracks data as it moves through the workflow to produce Business Intelligence (BI) dashboards from the collected data. Data is displayed in standard or custom views generated from data stored within the Kofax Analytics for TotalAgility database.

Dashboard views included with the product help you look at your business data in meaningful ways. These views include a variety of visual and analytical representations of data using charts, grids, pivot tables, and reports. You can also extract information from the Kofax TotalAgility User Tracking tables in your Kofax TotalAgility installation and from external databases.





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# Available Dashboards

This section lists several dashboards that are available out of the box.

Operations	<ul style="list-style-type: none"><li>▪ Overview</li><li>▪ Deleted Pages</li><li>▪ Time</li><li>▪ Cost</li><li>▪ Session Target Time</li><li>▪ Breakdowns</li><li>▪ Trending</li></ul>
Classification	<ul style="list-style-type: none"><li>▪ Documents</li><li>▪ Review By Operator</li><li>▪ Review By Process</li></ul>
Extraction	<ul style="list-style-type: none"><li>▪ Field Changes</li><li>▪ Field Analysis</li></ul>
Administration	<ul style="list-style-type: none"><li>▪ Jobs</li><li>▪ Resources</li><li>▪ No Touch</li></ul>
Reports	<ul style="list-style-type: none"><li>▪ Classification vs Review</li><li>▪ Misclassified and Reclassified</li><li>▪ Field Accuracy</li><li>▪ Operator Productivity</li></ul>

## Operations

Operational views show data which is provided in Insight data warehouse using the following two scheduled plans.

- A ten minute scheduled plan, giving near real-time information
- An hourly plan for less critical information

See *Kofax Analytics for TotalAgility Admin Guide* for more information.

### Overview

- **Current Activity Queue:** Displays the textual chart with the capture activity, count of each activity type that are due on or before the date selected, and time for the activity that has been pending the longest. Click a row in the table to work interactively with the data.
- **Activities in Progress per Operator:** Displays the textual chart with the name of the activity that is currently taken by a resource.

- **Completed Activity History by Type:** Displays the bar chart with the sum of each capture activity that is completed for a particular time slot. You can filter on activity types.
- **Finished Jobs by Process:** Displays the bar chart with the count of jobs completed for each process. You can filter on category.

## Deleted Pages

Displays the pages deleted from all documents in a folder with the following details:

- Date Deleted
- Operator
- Activity Name
- Process Name
- Number of Pages deleted

You can filter the data by category, process and timeframe.

## Time

- **Time Spent by User:** The time spent by user on each capture activity in terms of minutes.
- **Time Spent by Activity:** The time spent by activity in terms of minutes.
- **Top 3 Operators with Shortest Time (in minutes):** The top three operators who have spent the least amount of time working on capture activities.
- **Top 3 Operators with Longest Time (in minutes):** The top three operators who have spent the most amount of time working on capture activities.
- **Last 10 Days:** The time spent on each capture activity over the last 10 days.

There are several ways to look at the amount of time a particular user spends within a particular session. Select an area of the bar chart to drill down by:

- **Process:** Displays the breakdown of time spent on capture activities for each process.
- **Operator:** Displays the breakdown of time spent on capture activities for each operator.
- **Hour of day:** Displays the breakdown of time spent on capture activities for each hour of day.
- **Day of week:** Displays the breakdown of time spent on capture activities for each day of week.

## Cost

**Cost per Activity:** Displays the bar and pie chart of the costs per capture activity.

**Total Operation Cost:** Displays the total of the running cost per activity type over the specified time frame and the selected process.

**Costs per Hour:** Displays the costs per capture activity per hour with the sum of the running cost per activity type per hour.

**Lowest Cost per Operator:** Displays the three least costly operators. Hover the mouse on the report for details on time frame and process.

**Highest Cost per Operator:** Displays the three most costly operators.

## Session Target Time

- **Target Time:** Displays the target time associated with each capture activity.
- **Top Operators:** Displays the pie and bar chart with the operators who are specifically top in performing the capture activities under the target time. Select the area of the bar or pie chart to drill down the report on the category, process capture activity, day of week and hour of day.
- **Operators over Target:** Displays the operators who have exceeded the target time while working on capture activities.

## Breakdowns

### Jobs Created by Source

The breakdown of jobs created and their source. This information is a combination of live and historical data and is updated periodically. A stacked bar chart appears with the count of jobs created and the job source. To update the job source, you can call `UpdateJobSource()` SDK API on the `JobService`.

**Note** Note: Kofax recommends updating the job source as the first step within the business process.

Select a stack to drilldown on:

- **Capture Activity:** Displays the bar chart of capture activities live/completed (depending on stack selected) per job source.
- **Process:** Displays the bar chart of jobs per process live/completed (depending on stack selected) per job source.

### Jobs by Status

The breakdown of the capture jobs created and their status. This information is a combination of live and historical data and needs to be updated periodically.

You can filter the jobs by category, process, timeframe and live/completed jobs. Select an area on the pie chart to drilldown on:

- **Capture Activity:** Displays the pie chart with the number of each activity type in jobs grouped by status.
- **Process:** Displays the pie chart with the number of each job by process name grouped by status.
- **Source:** Displays the pie chart with the number of each job by source name grouped by status.

### Jobs by Priority

The breakdown of the jobs created and their priorities. This information is a combination of live and historical data and is updated periodically.

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

Select an area on the bar chart to drilldown on:

- Capture Activity: Displays the bar chart with the count of each activity type grouped by priority.
- Process: Displays the bar chart with the count of each job (by process name) grouped by priority.
- Source: Displays the bar chart with the count of each job (by process name) grouped by priority.

### **Jobs by Process**

The breakdown of the jobs created by process. This information is a combination of live and historical data and is updated periodically.

The bar chart appears with the count of all capture jobs by process type. Select an area on the bar chart to drilldown on:

- Capture Activity: Displays the bar chart with the count of each activity type grouped by process.
- Source: Displays the bar chart with the count of each job by source grouped by process.
- Priority: Displays the bar chart with the count of each job by priority grouped by process.

## **Trending**

### **Completed Activities**

The breakdown of the activities completed on an hourly basis. A stacked bar chart appears with the count of all completed capture activities for each hour. For example, at 9am there were three validation and four document review activities completed. Select an area on the bar chart to view the hourly breakdown of the Activity type n. You can filter the jobs by category, process, time frame and completed activities.

### **Time Pending**

The breakdown of activities - the time they became pending and for how long they were pending. This information is a combination of live and historical data and is updated periodically. A stacked bar chart appears that shows the hour that a capture activity became pending and for how long it was pending. You can further filter the jobs by pending/completed activities.

Select an area of the bar chart to view the hourly breakdown of the Activity type.

### **Jobs Created**

The breakdown of the capture jobs created by each day of the week. The bar chart appears with the number of capture jobs created each. You can filter the jobs by category, process and selected time frame.

Select an area of the bar chart to drill down on:

- Process: Displays daily breakdown for a specific process.
- Hour of day: Displays the job count and the hourly breakdown.

### **Jobs Completed**

The breakdown of the capture jobs completed by each day of the week. The bar chart appears with the number of capture jobs completed each day.

Select an area of the bar chart to drill down on:

- Process: Displays process type and the daily breakdown.
- Hour of day: Displays the job count and the hourly breakdown.

## Classification

### Documents

**Document Classification Change Ratio:** Displays the final document type, the count, classification confidence, number changed and the ratio of the total that were changed.

You can filter the jobs by category, process and time frame.

**Document Type Changes:** Displays the pie chart with the original document type and the number changed. Select a segment of the pie chart to drill down on:

- Document Type
- Count
- Confidence
- Changes
- Ratio

**Document Reclassification Matrix:** Displays the original document type, and a count of each document type changed to.

A bubble chart appears that shows how confident the system was classifying the documents.

- The y-axis displays how often a customer had to re-classify the document.
- The x-axis shows the system confidence.
- The size of the bubble indicates the number of documents.

**Document Type by Change Ratio and Confidence:** Displays the bubble chart that shows how confident the system was classifying the document types.

The y-axis displays how often a customer had to re-classify the document, the x-axis shows the system confidence. The size of the bubble indicates the number of documents. You can filter the data by the category/process and selected timeframe.

### Review By Operator

**Total Review Time by Operator:** Displays the total time spent on the document review for each operator per day. A stacked bar chart appears with the total time spent by operator performing the document review. Select an area of the bar chart to view the time for a particular operator.

**Average Review Time by Operator:** Displays the average time spent on document review for each operator per day. Select an area of the bar chart to view the time for a particular operator.

## Review by Process

**Total Review Time by Process:** Displays the total time spent on document review per business process per day of week. A bar chart appears with the total time spent performing document review for each process.

A grouped bar chart appears with the total time spent performing document review per process bar = time grouped by process.

**Average Review Time by Process:** Displays the average time spent on document review per business process per day of week. Select an area of the bar chart to view the time for a specific operator or specific process.

## Extraction

### Field Changes

Displays the bar chart with the document types and the percentage of the fields that have changed. The total number of fields changed appears above the bar chart. You can drilldown into a document to analyze extraction at the field level.

Select a document type in the bar chart to view the field statistics such as Field Name, Total, Confidence, Changed and Change Ratio.

### Field Analysis

Displays the bubble chart with the percentage of fields changed for each document type.

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

## Administration

### Jobs

**All Completed Jobs:** Displays the textual summary of all jobs that are currently completed in the system.

**All Live Jobs:** Displays the textual summary of all jobs that are currently live in the system

**Completed Jobs Summary:** Displays the graphical (bar chart) count of completed jobs for each process.

**Live Jobs Summary:** Displays the graphical (bar chart) count of live jobs for each process.

### Resources

**Number of Jobs created by resource this month:** Displays the graphical count of jobs created by each resource from the start of the month until the current date.

**Activities completed this week:** Displays the textual summary of all activities completed week to date by each resource.

**Activity Queue:** Displays the textual summary of the workload running within the organization across a configurable time period.

## No Touch

**No Touch Document Ratio:** Displays the percentage of document types that have been processed with no human interaction ('No Touch'). Select an area of the bar chart to view the percentage of 'No touch' for documents of each process type.

**Processed, No Touch, Ratio:** Displays the count of each type of document processed, the number that were 'no touch' and the ratio of 'touch' versus 'No touch'.

## Reports

### Classification vs Review

Provides visibility to the classified document type assigned to each image versus the document type assigned after review with the following details:

- Initial Class
- Classified Time
- Confidence
- Review Time
- Reviewed Class

### Misclassified and Reclassified

**Misclassified Document Type:** Provides the visibility to the most common document types incorrectly assigned by the system with the following details:

- Process
- Initial Class
- Reviewed Class

**Reclassified Document Type:** Provides the visibility to the most common document types requiring reviewer reclassification with the following details:

- Process
- Reviewed Class
- Classified Class

### Field Accuracy

Displays the summary of field level and character level accuracy within a process during a given date/time period.

## **Operator Productivity**

Displays an overview of the average time an operator has spent on an activity or process in a given date/time period.



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