

Kofax Analytics for TotalAgility

Product Features Guide

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Preface

This guide gives an overview of the dashboards in Kofax Analytics for TotalAgility. These dashboards help you track data through the workflow, analyze the effectiveness of the processes and 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 should read this guide. Users include business process owners, such as individuals in charge of the invoice or any other process.

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

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. The *Administrator's Guide* describes charts and grids and how to use them to gain real-time project information. 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 in the 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.

Training

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

Get 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 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.

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. Data stored within the Kofax Analytics for TotalAgility database displays in standard or custom views.

Dashboard views help you look at your business data in meaningful ways. These views include 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.

Available Dashboards

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

Operations

Operational views show data in the 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 the *Kofax Analytics for TotalAgility Administrator's Guide* for more information.

Overview

Current Activity Queue

Displays a textual chart with information for each capture activity type, including how many activities are due on or before the date selected, and the time for the activity that has been pending the longest. Click a row in the table to work interactively with the data.

Current Activity Queue uses information from the following metrics:

- Activity Due Count — A breakdown of the number of Pending capture activities per Activity Type.
- Activity Due Max Pending Time — The maximum time each capture Activity Type has been pending.

Activities in Progress per Operator

Displays a textual chart with the name of the activity that is currently taken by the selected resource.

Activities in Progress per Operator uses the following record:

- Activity Resource Active —A list of capture activities currently being performed (excluding those being performed by the System Resource) that also records Category, Activity Name, Process, Performing Resource ID and Activity Type.

Completed Activity History by Type

Displays the bar chart with the total time of each capture activity that is completed for a particular time slot. You can filter on activity types.

Completed Activity History by Type uses information from the following metrics:

- Activity Completed Count —The number of Completed capture activities broken down by Activity Type.

Finished Jobs by Process

Displays a bar chart of how many jobs are completed for each process. You can filter on category.

Finished Jobs by Process uses information from the following metrics:

- Job Session Finish Count — The number of the Completed Jobs (Completed, Terminated, Awaiting Case Completion and Awaiting Case Completion Terminated) grouped by Process. Only those Jobs for which the capture activities were performed will be reported upon.

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 time.

Deleted Pages uses the following record:

- Batch Pages Deleted — A list of deleted pages, that also records the Activity and Process in which the pages were deleted, the user who deleted the pages and the time at which they were deleted.

Time

Time Spent by User

The time spent by user on each capture activity in minutes.

Time Spent by User uses information from the following metrics:

- Activity Completed Time Exclude TotalAgility — The Completed capture activities not performed by the System resource.

Time Spent by Activity

The time spent by activity in minutes.

Time Spent by Activity uses information from the following metrics:

- Activity Completed Time — The Total Working Time spent on Completed capture activities grouped by Activity Type. You can further break it down by Day of week, Hour of day, Process or Operator.

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 Shortest Time (in minutes) uses information from the following metrics:

- Activity Completed Time Exclude TotalAgility — The Completed capture activities not performed by the System resource.

Top 3 Operators with Longest Time (in minutes)

The top three operators who have spent the most amount of time working on capture activities.

Top 3 Operators with Longest Time (in minutes) uses information from the following metrics:

- Activity Completed Time Exclude TotalAgility — The Completed capture activities not performed by the System resource.

Last 10 Days

The time spent on each capture activity in the past 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 expand:

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

Last 10 Days uses information from the following metrics:

- Activity Completed Time — The Total Working Time spent on Completed capture activities grouped by Activity Type. You can further break it down by Day of week, Hour of day, Process or Operator.

Cost

Cost per Activity

Displays the bar and pie chart of the costs for each capture activity.

Cost per Activity uses information from the following metrics:

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

Total Operation Cost

Displays the running cost total for each activity type over the specified time frame and the selected process.

Total Operation Cost uses information from the following metrics:

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

Costs per Hour

Displays the costs for each capture activity per hour and the running cost per activity type per hour.

Costs per Hour uses information from the following metrics:

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

Lowest Cost per Operator

Displays the three least costly operators. Hover the mouse on the report for details on time frame and process.

Lowest Cost per Operator uses information from the following metrics:

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

Highest Cost per Operator

Displays the three most costly operators.

Highest Cost per Operator uses information from the following metrics:

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

Session Target Time

Target Time

Displays the target time associated with each capture activity.

Target Time uses information from the following metrics:

- Activity Target Time — Sums of Expected Duration in seconds for capture Activities grouped by Activity Type.

Top Operators

Displays the pie and bar charts for the top operators who perform the capture activities in less than the target time. Select the area of the bar or pie chart to display the category, process capture activity, day of week, and time.

Top Operators uses information from the following metrics:

- Activity Completed Early Count — Information pertaining to activities where the `WORKING_TIME_SPENT < EXPECTED_DURATION_IN_SECONDS`.

Operators over Target

Displays the operators who have exceeded the target time while working on capture activities.

Operators over Target uses the following record:

- Activity Completed Late —A list of Completed capture activities where the working time spent is greater than the expected duration.

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 number of jobs created and the job source. To update the job source, call `UpdateJobSource()` SDK API on the `JobService`.

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

Select a stack to expand:

- 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 Created by Source uses information from the following metrics:

- Job Session Created Count — Jobs containing performed capture activities. Other information includes Creation time, Priority, Process, Source, Category and Status.

Jobs by Status

Jobs containing performed capture activities. Other information includes Creation time, Priority, Process, Source, Category and Status.

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

- 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 Status uses information from the following metrics:

- Job Session Created Count — Jobs containing performed capture activities. Other information includes Creation time, Priority, Process, Source, Category and 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 expand:

- 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 Priority uses information from the following metrics:

- Job Session Created Count —Jobs containing performed capture activities. Other information includes Creation time, Priority, Process, Source, Category and Status.

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 expand:

- 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.

Jobs by Process uses information from the following metrics:

- Job Session Created Count —Jobs containing performed capture activities. Other information includes Creation time, Priority, Process, Source, Category and Status.

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 9 AM there were 3 validation activities and 4 document review activities completed. Select an area on the bar chart to view the hourly breakdown for that Activity type. You can filter the jobs by category, process, time frame and completed activities.

Completed Activities uses information from the following metrics:

- Activity Pending Completed Count — The number of Completed capture activities grouped by Activity Type and Hour completed. Other information includes Job's Category, Hour completed, Associated Process and the time at which the activity became pending.

Time Pending

For pending activities, displays when the activities became pending and for how long they were pending in a stacked bar chart. This information is a combination of live and historical data and is updated periodically. Select an area of the bar chart to view the hourly breakdown of the Activity type. You can further filter the jobs by pending/completed activities.

Time Pending uses information from the following metrics:

- Activity Pending All Seconds — The total Pending Time in seconds grouped by capture Activity Type. Other information includes Category, Pending Time, Hour Pending, Process and Status.

Jobs Created

The breakdown of the capture jobs created by each day of the week in a bar chart. You can filter the jobs by category, process, and time.

Select an area of the bar chart to expand:

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

Jobs Created uses information from the following metrics:

- Job Session Created Count By Day Of Week — A breakdown of Jobs (with capture activities performed) by Creation time (Day of week and Hour of Day).

Jobs Completed

The breakdown of the capture jobs completed each day in a bar chart.

Select an area of the bar chart to expand:

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

Jobs Completed uses information from the following metrics:

- Job Session Finished Count By Day Of Week — A breakdown of Completed Jobs (Completed, Terminated, Awaiting Case Completion and Awaiting Case Completion Terminated) with capture

activities performed broken down by Finish time (Day of week and Hour of Day). Other information includes Category and Process.

Classification

Documents

Document Classification Change Ratio

Displays the final document type, the count, classification confidence, number changed, and the percent of the total that were changed.

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

Document Classification Change Ratio uses information from the following metrics:

- Document Review Count — A list of Reviewed Documents grouped by Document class / type. Other information includes Process, Initial Document Class / type, and the datetime the document was classified.
- Document Review Average Confidence — The Average confidence of Reviewed Documents grouped by Document class / type.
- Document Review Change Count — The number of Reviewed Documents for which the Document class / type was modified. Other information includes classification datetime, Day of week classified, Hour of Day classified, initial document type, final document type, Process and Operator.
- Document Review Change Ratio — The ratio of Documents Changed / Total number of Documents grouped by Document Type.

Document Type Changes

Displays a pie chart with the original document type and the number changed. Select a segment of the pie chart to display:

- Document Type
- Count
- Confidence
- Changes
- Ratio

Document Type Changes uses information from the following metrics:

- Document Review Change Count — The number of Reviewed Documents for which the Document class / type was modified. Other information includes classification datetime, Day of week classified, Hour of Day classified, initial document type, final document type, Process and Operator.

Document Reclassification Matrix

Displays the original document type and a count of each final document type.

A bubble chart displays how confident the system was in 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 Reclassification Matrix uses information from the following metrics:

- Document Classification Change Count — The number of Documents which have been Reviewed and Classified whose document classification (document type) has changed.

Document Type by Change Ratio and Confidence

Displays a bubble chart that shows how confident the system was in 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.

Document Type by Change Ratio and Confidence uses information from the following metrics:

- Document Classification Average Confidence — The average confidence of Documents which have been reviewed and Classified grouped by their initial classification. Other information includes date-time classified, Process and the final document type.
- Document Classification Change Ratio — The ratio of reviewed and classified documents whose classification has changed / the number of reviewed and classified documents.
- Document Classification Change Count — The number of Documents which have been Reviewed and Classified whose document classification (document type) has changed.

Review By Operator

Total Review Time by Operator

Displays the total time spent on the document review for each operator per day in a stacked bar chart. Select an area of the bar chart to view the time for a particular operator.

Total Review Time by Operator uses information from the following metrics:

- Activity Completed Review Total Time — The sum of the Working Time spent on Completed Document Review activities. Other information includes Category, Completion date, Day of week the activity was completed, Operator and Process.

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.

Average Review Time by Operator uses information from the following metrics:

- Activity Completed Review Average Time — The average Working Time spent on Completed Document Review activities. Other information includes Category, Completion date, Day of week the activity was completed, Operator and Process.

Review by Process

Total Review Time by Process

Displays the total time spent on document review per business process per day of week in a bar chart . A grouped bar chart appears with the total time spent performing document review per process.

Total Review Time by Process uses information from the following metrics:

- Activity Completed Review Total Time —The sum of the Working Time spent on Completed Document Review activities. Other information includes Category, Completion date, Day of week the activity was completed, Operator and 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.

Average Review Time by Process uses information from the following metrics:

- Activity Completed Review Average Time — The average Working Time spent on Completed Document Review activities. Other information includes Category, Completion date, Day of week the activity was completed, Operator and Process.

Extraction

Field Changes

Fields Changed

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.

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

Fields Changed uses information from the following metrics:

- Document Class Fields Change Ratio — The number of fields changed as a ratio of the total number of fields grouped by Document Class.

Field Changes Summary

Displays the field statistics associated with the selected document type; Field Name, Total, Confidence, Changed and Change Ratio.

Field Changes Summary uses information from the following metrics:

- Document Class Field Total Number — A breakdown of number of fields grouped by Field Name and Document Class. The root source of this information is the Field Fact and Document records.
- Document Class Field Confidence — The average Confidence per Field (name) grouped by Document Class.
- Document Class Field Changes — A breakdown of number of changed fields grouped by Field Name and Document Class. The root source of this information is the Field Fact and Document records.
- Document Class Field Change Ratio — The ratio of Document Class Field Changes / Document Class Field Total Number, that is, the Number of Fields Changed / Total Number of Fields grouped by Field Name and Document Class.

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.

Document Type Change Ratio

Displays a chart showing the document types and percentage of fields which have changed within each document type.

Document Type Change Ratio uses information from the following metrics:

- Document Class Fields Change Ratio — The ratio of Document Class Field Changes / Document Class Field Total Number, that is, the Number of Fields Changed / Total Number of Fields grouped by Field Name and Document Class.

Document Type Change Ratio and Confidence

Displays the change ratio and the field confidence grouped by document type / class.

Document Type Change Ratio and Confidence uses information from the following metrics:

- Document Class Field Confidence —The average Confidence per Field (name) grouped by Document Class.
- Document Class Field Change Ratio — The ratio of Document Class Field Changes / Document Class Field Total Number, that is, the Number of Fields Changed / Total Number of Fields grouped by Field Name and Document Class.
- Document Class Field Changes —A breakdown of number of changed fields grouped by Field Name and Document Class. The root source of this information is the Field Fact and Document records.

Administration

Jobs

All Completed Jobs

Summarizes all completed jobs in the system.

All Completed Jobs uses the following record:

- Job Resource Completed — A list of Completed Jobs (Completed and Awaiting Case Completion) that also records the Job Creator, the Job Creator's Group, Process, Start Time, Expected Finish Time, Finish Time, Job ID, Category and Working Duration in Days.

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

All Live Jobs

Summarizes all live jobs in the system.

All Live Jobs uses the following record:

- Job Resource Live — A list of Live Jobs (Active, Suspended and OnHold) that also records the Job Creator, the Job Creator's Group, Process, Start Time, Expected Finish Time, Job ID, Category and Working Duration in Days.

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

Completed Jobs Summary

Displays a bar chart of completed jobs for each process.

Completed Jobs Summary uses information from the following metrics:

- Job Resource Completed Count — The number of Completed Jobs (Completed and Awaiting Case Completion) grouped by the Job Creator. This metric uses the Job Resource Completed Record.

Live Jobs Summary

Displays a bar chart of live jobs for each process.

Live Jobs Summary uses information from the following metrics:

- Job Resource Live Count — The number of Live Jobs (Active, Suspended and OnHold) grouped by Job Creator. This metric uses the Job Resource Live Record and includes Category, Start time, Process and the Job creator's group.

Resources

Number of Jobs created by resource this month

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

Number of Jobs created by resource uses information from the following metrics:

- Job Resource Created Count — The number of Jobs created grouped by Job Creator. This metric uses the Job Resource Created Record and includes Category, Start time, Process and the Job creator's group.

Activities completed this week

Summarizes all activities completed by each resource from the beginning of the week until the current date.

Activities completed this week uses the following record:

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

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

Activity Queue

Summarizes the workload in the organization during a configurable time period.

Activity Queue uses the following record:

- Activity Resource Pending — A list of Activity information obtained from the Queue Record. This information includes Category, Assigned Resource, Assigned Resources Group, Job ID, Activity Name, Pending Time, Priority, Process, SLA, and Status.

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

Reports

Classification vs Review

Displays the classified document type assigned to each image before and after review with the following details:

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

Classification vs Review uses the following record:

- Classification vs Review — A list of a subset of information from all Documents that records Document Class, Classified Time, Percentage Confidence, Confident, Initial Document Classification, Process and Review Time.

This record uses the Document, Session and Job Records as the source of information.

Misclassified and Reclassified

Misclassified Document Type

Displays the most common document types incorrectly assigned by the system with the following details:

- Process
- Initial Class
- Reviewed Class

Misclassified Document Type uses the following record:

- Misclassified Document Type — A list of a subset of information from all Documents that records Document Class, Initial Document Class, Process and Review time.

This record uses the Document, Session and Job Records as the source of information.

Reclassified Document Type

Displays the most common document types requiring reviewer reclassification with the following details:

- Process
- Reviewed Class
- Classified Class

Reclassified Document Type uses the following record:

- Misclassified Document Type — A list of a subset of information from all Documents that records Document Class, Initial Document Class, Process and Review time.

This record uses the Document, Session and Job Records as the source of information.

Field Accuracy

Displays a summary of field-level and character-level accuracy for a process during a given time period.

Field Accuracy uses information from the following metrics:

- Accuracy Field Count — The fields (field name) and the corresponding field count. This metric uses the Field Accuracy Record and includes the Document Class / Type.
- Accuracy Character Count —The total character count grouped by field name. This metric uses the Field Accuracy Record and includes the Document Class / Type.
- Accuracy Conf. Character Count — A count of the total number of confirmed characters grouped by field name. This metric uses the Field Accuracy Record and includes the Document Class / Type.
- Accuracy Validated Field Count — The number of validated fields grouped by field name. This metric uses the Field Accuracy Record and includes the Document Class / Type.
- Accuracy Changed Field Count — The number of fields changed grouped by field name. This metric uses the Field Accuracy Record and includes the Document Class / Type.
- Accuracy Validated Character Count — The total number of validated characters grouped by Field Name.

Operator Productivity

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

Operator Productivity uses information from the following metrics:

- Productivity Activity Count — The number of Completed capture activities (not performed by the system resource) grouped by performing resource.
- Productivity Documents Completed — The number of documents completed (not performed by the system resource) grouped by performing Resource.
- Productivity Time Spent — The Working Time Spent (not performed by the system resource) grouped by performing Resource.
- Productivity Job Count — The number of jobs, grouped by user, in which the user has Completed capture activities.
- Productivity Avg Time Per Process — An average of the Time Spent per Job grouped by Resource. It is derived from the following metrics as: Productivity Time Spent / Productivity Job Count.
- Productivity Avg Time Per Activity — An average of the Time Spent per Activity (for capture activities only) grouped by Resource. It is derived from the following metrics as: Productivity Time Spent / Productivity Activity Count.

TotalAgility

You can directly access Workspace from Kofax Analytics of TotalAgility and perform the TotalAgility actions.

If only one server is configured, clicking this tab directly opens the Workspace. If more than one servers are configured, a pop-up is displayed where you can select the server, and access the Workspace of the selected server.

Record Definitions

This section lists several records that are available. Chart designers can now consume states and milestones.

Activity Record

This is a combination of the following records:

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

The Activity1 record stores the following:

Activity1 Record	Source Column in LIVE_ACTIVITY table
EMBEDDED_PROCESS_COUNT	EMBEDDED_PROCESS_COUNT
NODE_ID	NODE_ID
ACTIVITY_STATUS	ACTIVITY_STATUS
AUTOMATIC	AUTOMATIC
DUE_DATE	DUE_DATE
COMPLETED_DATE	PENDING_TIME
EXPECTED_COST	EXPECTED_COST
EXPECTED_DURATION_IN_SECONDS	EXPECTED_DURATION_IN_SECONDS
NODE_NAME	NODE_NAME
PRIORITY	PRIORITY
PROCESS_NAME	PROCESS_NAME
SLA_STATUS	This is an enumeration based on the Current date time relative to LIVE_ACTIVITY.SLA_STATUS2_DATE and LIVE_ACTIVITY.SLA_STATUS3_DATE
TYPE	TYPE
VERSION	VERSION
PENDING_TIME	PENDING_TIME
PENDING_TIME_IN_SECONDS	Calculated from the PENDING_TIME
TAKEN_TIME	TAKEN_TIME
PROCESS_ID	Process Name + PROCESS_ID as a string
PROCESS_NAME	PROCESS_NAME
JOB_ID	JOB_ID
PERFORMING_RESOURCE_ID	PERFORMING_RESOURCE_ID

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

Job Record

This is a combination of the following records:

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

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

The Job1 record stores the following:

Job1 Record	Source Column
ASSOCIATED_CASE_ID	JOB.ASSOCIATED_CASE_ID
COST_OVERRUN	JOB.COST_OVERRUN
CREATION_TIME	JOB.CREATION_TIME
DURATION_OVERRUN	JOB.DURATION_OVERRUN
EXPECTED_COST	JOB.EXPECTED_COST
EXPECTED_DURATION_IN_SECONDS	JOB.EXPECTED_DURATION_IN_SECONDS
FINISH_TIME	JOB.FINISH_TIME
JOB_STATUS	JOB.JOB_STATUS
JOB_PERCENT	JOB.JOB_PERCENT
PRIORITY	JOB.PRIORITY
SLA_STATUS	This is an enumeration based on the Current date time relative to JOB.SLA_STATUS2_DATE and JOB.SLA_STATUS3_DATE
START_TIME	JOB.START_TIME
LAST_MODIFIED_DATE	JOB.LAST_MODIFIED_DATE
TYPE	JOB.TYPE
VERSION	JOB.VERSION
EXPECTED_FINISH_TIME	JOB.EXPECTED_FINISH_TIME
STATE	JOB.STATE
WORKING_DURATION_DAYS	-1
PROCESS_ID	JOB.PROCESS_ID
CATEGORY_ID	JOB.CATEGORY_ID
JOB_ID	JOB.JOB_ID
SOURCE	JOB.SOURCE
Creator	JOB.CREATOR
Owner	JOB.OWNER
PROCESS_NAME	JOB.PROCESS_NAME
PROCESS_ID_STR	Derived from JOB.PROCESS_ID

The Job2 record retrieves similar information.

Batch Record

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

- Batch_dim
- Batch_accum_fact
- Etl_job

The following fields are stored in the Batch Record:

Batch Record	Source Column
Batch_key	Batch_dim.batch_key
Create_datetime	Etl_job.Etl_End_time
Docs_completed	Batch_accum_fact.docs_compl_num
Is_deleted	Batch_dim.Is_deleted
Pages_deleted_num	Batch_accum_fact.Pages_deleted_num
Pages_num	Batch_accum_fact.Pages_num

Document Record

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

- Doc_dim
- Doc_accum_fact
- Doc_sess_snapshost_fact
- Batch_sess_snapshost_fact
- Field_accum_fact
- Etl_job

The following fields are stored in the Document record:

Document Record	Source Column
Batch_key	Doc_accum_fact.Batch_key
changed	This is derived from Doc_dim (doc_class_key == initial_doc_class_key)
Classified	Determined from doc_session_snapshot_fact (if there is a session type indicating classification)
Classified_datetime	Doc_dim.dt_last_class_datetime
confidence_percentage	Doc_accum_fact.class_confidence_perc
Confident	Doc_accum_fact.is_confly_classified
doc_class	Doc_dim.doc_class_key
doc_key	Doc_dim.doc_key
dt_last_proc_datetime	Etl_job.Etl_End_time

Document Record	Source Column
extracted	Determined from doc_session_snapshot_fact (if there is a session type indicating extraction)
initial_doc_class	Doc_dim.initial_doc_class_key
is_attended_session	Batch_sess_snaphost_fact.is_attended_session
key_strok_num	Doc_accum_fact.key_strok_num
PROCESSED	Doc_dim.is_exported
review_datetime	Doc_dim.dt_last_review_datetime
Reviewed	TRUE if Doc_dim.dt_last_review_datetime > Doc_dim.dt_last_clas_datetime
time_spent_in_classification	Doc_accum_fact.ms_in_class
UN_TOUCHED	UN_TOUCHED =TRUE if no fields in the document have changed. This is determined checking field_value == original_field_value in the field_accum_fact table.
validated	Determined from doc_session_snapshot_fact (if there is a session type indicating validation)

Field Fact Record

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

- Field_accum_fact
- Doc_dim

The following fields are stored in the Field Fact record:

Field Fact Record	Source Column
Confidence	Field_accum_fact.field_confidence_perc
doc_class	Doc_dim.doc_class_key
doc_key	Field_accum_fact.doc_key
field_name	Field_accum_fact.field_name
field_value	Field_accum_fact.field_value
is_changed	TRUE if original_value == field_value
original_value	Field_accum_fact.original_value
recognized_length	Field_accum_fact.chars_recognized_num
validated_length	Field_accum_fact.okchars_validated_num

Resource Group Record

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

- AW_RESOURCE

- GROUP_MEMBERS

The following fields are stored in the Resource Group record:

Resource Group Record	Source Column
Group	AW_RESOURCE.RESOURCE_ID if AW_RESOURCE.RESOURCE_TYPE==3 ELSE GROUP_MEMBERS.GROUP_RESOURCE_ID
Resource	AW_RESOURCE.RESOURCE_ID

Queue Record

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

- LIVE_ACTIVITY
- LIVE_ACTIVITY_RESOURCE
- JOB

The following fields are stored in the Field Fact record:

Queue Record	Source Column
ACTIVITY_STATUS	LIVE_ACTIVITY.ACTIVITY_STATUS
Category	JOB.CATEGORY_ID
EMBEDDED_PROCESS_COUNT	LIVE_ACTIVITY.EMBEDDED_PROCESS_COUNT
JOB_ID	LIVE_ACTIVITY_RESOURCE.JOB_ID
NODE_ID	LIVE_ACTIVITY_RESOURCE.NODE_ID
NODE_NAME	LIVE_ACTIVITY.NODE_NAME
PENDING_TIME	LIVE_ACTIVITY.PENDING_TIME
Priority	LIVE_ACTIVITY.PRIORITY
Process	JOB.PROCESS_ID
PROCESS_ID_2	Derived from JOB.PROCESS_ID - maintained as a string (as opposed to binary(16))
RESOURCE_ID	Derived from LIVE_ACTIVITY_RESOURCE.RESOURCE_ID. Maintained as a string.
SLA_STATUS	An enumeration based on how the current datetime compares to LIVE_ACTIVITY.SLA_STATUS2_DATE and LIVE_ACTIVITY.SLA_STATUS3_DATE
STATUS	LIVE_ACTIVITY_STATUS.STATUS

Field Accuracy Record

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

- Field_accum_fact
- Doc_dim

The following fields are stored in the Field Accuracy record:

Field Accuracy Record	Source Column
Class	Doc_dim.doc_class_key
Conf_chars	SUM(field_accum_fact.conf_chars_num)
Field	field_accum_fact.field_key
Field_num	field_accum_fact.Count(*)
fields_changed	SUM of fields where field_value == original_value
total_chars	SUM(Field_accum_fact.chars_recognized_num)
validated_chars	SUM(Field_accum_fact.chars_validated_num)

Session Record

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

- batch_sess_snapshot_fact
- etl_job

The following fields are stored in the Session record:

Session Record	Source Column
batch_key	batch_sess_snapshot_fact.batch_key
conf_classes_changed_num	batch_sess_snapshot_fact.conf_classes_changed_num
corr_split_points_num	batch_sess_snapshot_fact.corr_split_points_num
docs_compl_num	batch_sess_snapshot_fact.docs_compl_num
docs_created_num	batch_sess_snapshot_fact.docs_created_num
docs_deleted_num	batch_sess_snapshot_fact.docs_deleted_num
docs_num	batch_sess_snapshot_fact.docs_num
docs_unclassified_num	batch_sess_snapshot_fact.docs_unclassified_num
dt_end_datetime	Etl_job.dt_end_datetime
folders_created_num	batch_sess_snapshot_fact.folders_created_num
folders_deleted_num	batch_sess_snapshot_fact.folders_deleted_num
folders_merged_num	batch_sess_snapshot_fact.folders_merged_num
folders_split_num	batch_sess_snapshot_fact.folders_split_num
is_attended_sess	batch_sess_snapshot_fact.is_attended_sess
key_strok_num	batch_sess_snapshot_fact.key_strok_num
missed_split_points_num	batch_sess_snapshot_fact.missed_split_points_num

Session Record	Source Column
pages_deleted_num	batch_sess_snapshot_fact.pages_deleted_num
pages_num	batch_sess_snapshot_fact.pages_num
pages_replaced_num	batch_sess_snapshot_fact.pages_replaced_num
pages_scanned_num	batch_sess_snapshot_fact.pages_scanned_num
sess_duration_sec	batch_sess_snapshot_fact.sess_duration_sec
session_type	batch_sess_snapshot_fact.session_type
sugg_classes_accepted_num	batch_sess_snapshot_fact.sugg_classes_accepted_num
sugg_classes_changed_num	batch_sess_snapshot_fact.sugg_classes_changed_num
ta_embedded_process_count	batch_sess_snapshot_fact.ta_embedded_process_count
ta_job_id	batch_sess_snapshot_fact.ta_job_id
ta_node_id	batch_sess_snapshot_fact.ta_node_id
user_key	batch_sess_snapshot_fact.user_key
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