Kofax Analytics for TotalAgility

Product Features Guide

Version: 1.4.0

Date: 2018-06-20

KOFAX

Table of Contents

Preface

This guide gives an overview of the dashboards in Kofax Analytics for TotalAgility. 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

The full documentation set for Kofax Analytics for TotalAgility is available at the following location:

https://docshield.kofax.com/Portal/Products/KAFTA/1.4.0-3k8rtu8xuv/KAFTA.htm

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

- *Kofax Analytics for TotalAgility Administrator's Guide*: Describes the standard and silent methods for installing or upgrading Kofax Analytics for TotalAgility. Also explains configuration steps that are required to get started working with the product.
- *Kofax Analytics for TotalAgility Release Notes*: The release notes contain late-breaking information that may not be included in other Kofax Analytics for TotalAgility documentation.
- Kofax Insight Documentation: The product documentation for Kofax Insight 6.0.0 is hosted online:
  http://docshield.kofax.com/Portal/Products/Insight/600-j3y2jmmw57/Insight.htm

Offline documentation

To access the documentation for offline use (without an Internet connection), you can download it from the Kofax Fulfillment Site. The documentation package is available to download as a compressed file, KofaxAnalyticsForTotalAgilitydocumentation1.4.0_EN.zip. The .zip file includes a print folder that contains the *Product Features Guide* and the *Administrator's Guide*.

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.

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 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.

Chapter 1

Introduction

This guide provides an overview of the dashboard views included in your Kofax Analytics for TotalAgility installation. These dashboards help you track data through the workflow, analyze the effectiveness of the processes and resources, and address business problems. These views include a variety of visual and analytical representations of data using charts, grids, pivot tables, and reports. System administrators, business process managers, and other stakeholders use this interface to gain visibility into analytical information. Select from the comprehensive set of view types provided with the product, or use Insight Studio to create custom views based on the predefined components.

Kofax Analytics for TotalAgility

Kofax Analytics for TotalAgility is an extension of Kofax TotalAgility that tracks data as it moves through the workflow and produces Business Intelligence dashboards from the collected data.

When using linked servers in TotalAgility, Reporting (Capture) information is sent to the main TotalAgility server from the linked TotalAgility servers. The core BPM data still resides at the distributed sites. You configure Kofax Analytics for TotalAgility to include Reporting (Capture) information from the main server and to include BPM information directly from each linked Kofax TotalAgility server.

Kofax Analytics for TotalAgility includes the following:

- Viewer: Use to display the data in standard or custom views generated from data stored within the Kofax Analytics for TotalAgility database.
- Insight Studio: Use for creating and editing views.

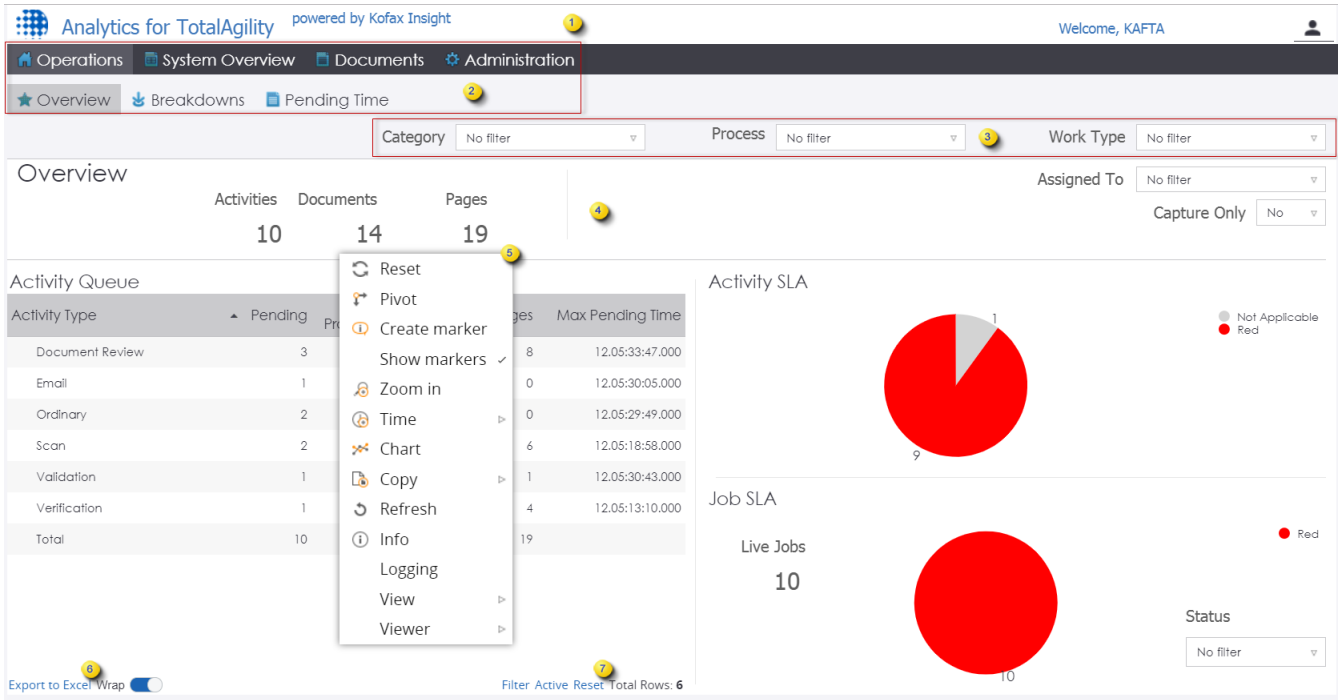
For information about the Kofax Analytics for TotalAgility installation, see the *Kofax Analytics for TotalAgility Administrators Guide*.

Chapter 2

Dashboard Overview

The Kofax Analytics for TotalAgility dashboard (called the Viewer) consists of interactive views and reports.

Main elements of the Kofax Analytics for TotalAgility interface



1	Title Bar	Appears on every interface window and includes:
		• Title of the application
		• Name of the logged in user
		• Current date
		• Additional user menu items:
		  • Language: Switches the dashboard display in another language.
		  • Bookmarks: Adds a frequently used view as a favorite and sets bookmark visibility for public, personal, or selected roles. the bookmark visibility with public, personal or to selected roles.
		  • About: To view the currently installed version of Kofax Analytics for TotalAgility.
		  • Logout: Logs out current user from the application.

2	Dashboard views	Use the menu to access the following views: • Operations • System Overview • Documents • Administration
3	Global Filters	Use the global filters to manage the data that displays on the dashboard. Each dashboard has different filters. For example, the Category, Process and Work Type filters are available on the Overview dashboard, and the Date filter is only applied to reports displaying the historical data.
4	Dashboard viewer	Displays the selected dashboard view.
5	Context menus and chart options	Right-click a chart or grid to access options such as Reset, Pivot, Zoom in, View, and Metric grid format as applicable. The options vary, based on the chart type or area where you right-click. Double-click a chart to change the breakdown. For example, change the data view of a pie chart from Batch Class to Days of the Week or Module Name. Options vary, based on the chart type.
6	Export to Excel	Includes the options to export the dashboard view content to an export format.
7	Chart and Grid Footers	Additional features are available in the footer on some charts and grids. Features may include Export to Excel, text wrap settings, filters and reset. Footers may also include chart- or grid-specific summary data such as total number of rows.

Viewer

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

Display the data in standard or custom views generated from data stored within the Kofax Analytics for TotalAgility database. You can extract information from Kofax TotalAgility databases.

Create new views using Insight. See *Kofax Insight Documentation* for more information. You can also copy a view supplied with your Kofax Analytics for TotalAgility installation and save it with a new name to modify.

By default, the Viewer displays in the language selected in the Region and Language settings for your operating system. To select another language, see Select a language.

Select a language

When you install Kofax Analytics for TotalAgility, the dashboard views display in the language specified in the browser settings. In the header, on the user profile options, use the language selector to switch to any of the following supported languages:

- English
- Spanish
- French
- Italian
- Brazilian Portuguese
- German
- Japanese

Export to Excel

On any grid with Export to Excel functionality, you can select preferences that affect the content and format when the grid is exported to Microsoft Excel.

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

   The Export to Excel page appears.
2. Select an **Export content** option:
   - **Current page and top drill down**
   - **All pages of grip, top drill down level. Could take some time.**
   - **All pages of grid, all drill down levels. Could take much longer.**
   - **Export current state**
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.

Chapter 3

Kofax Analytics for TotalAgility dashboard views

This section gives information about working with the following views on the Kofax Analytics for TotalAgility dashboard. The dashboard consists of interactive views and reports that help you look at your business data in meaningful ways. These views include charts, grids, and pivot tables.

Use the following menus to access the Kofax TotalAgility dashboard views:

- Operations
- System Overview
- Documents
- Administration

Default view

When you launch Kofax Analytics for TotalAgility, the Operations-Overview appears by default, and it lists the following items:

- Global filters for Category, Process and Work Type
- Page filters for Assigned To, and Capture Only
- Total count of activities, documents and pages
- Activity Queue
- Activity SLA
- Job SLA

Operations

The Operations views contains live data that is used to analyze the live (current) activities and jobs. The data displayed on this dashboard is updated with the minute execution plan giving near real-time information.

The Operations menu includes the following views:

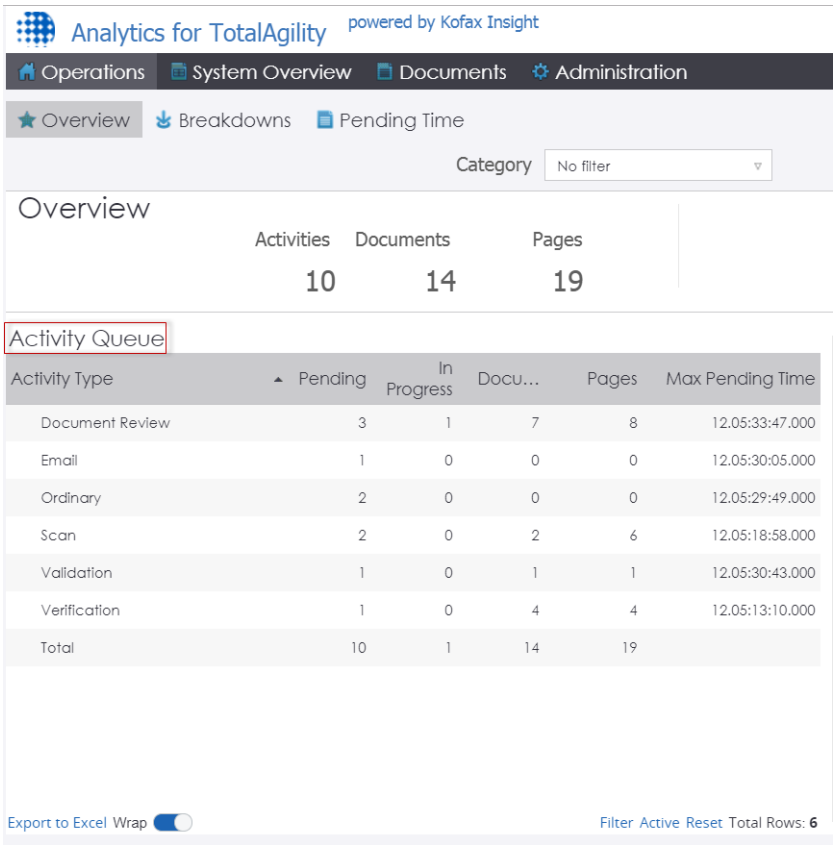
- Overview
- Breakdowns
- Pending Time

Overview

The Overview displays the data based on all live activities. At the top of the view, a count of the live activities, documents and pages that are currently in TotalAgility is displayed. Use this view to analyze the activity queue, job SLA and activity SLA.

Activity Queue

A textual chart that displays the information for each activity type, including the count of live activities that are pending and in progress, count of documents and pages that are pending, and the time for the activity that has been pending the longest.



When you select an activity type in the Activity Queue grid, the Activity Details pop-up displays the details (process name, activity, priority, status, due date, resource, activity SLA, documents and pages) for that activity type. Use the Status filter to view the processes by status, such as, Active (In Progress).

Activity Details for Scan

Activity Status No filter

Process Name	Activity	Priority	Status	Due Date	Resource	Activity SLA	Docum...	Pages
Decision Process	ReScan	1	Pending	05/02/2018 10:27:17.613 AM	Everyone		1	2
Decision Process	ReScan	1	Pending	05/02/2018 10:33:58.037 AM	Everyone		1	4

Export to Excel Wrap Filter Active Reset Total Rows: 2

Job History: Case Reference:

Process Name	Version	Activity	Status	Resource	Time	Time Spent	Documents	Pages

Select a row in the activity details grid to view the job history details.

Activity Details for Scan

Activity Status No filter

Process Name	Activity	Priority	Status	Due Date	Resource	Activity SLA	Docum...	Pages
Decision Process	ReScan	1	Pending	05/02/2018 10:27:17.613 AM	Everyone		1	2
Decision Process	ReScan	1	Pending	05/02/2018 10:33:58.037 AM	Everyone		1	4

Export to Excel Wrap Filter Active Reset Total Rows: 2

Job History: 7FA447CF7C9341E1AA9F81F858A82E2F Case Reference:

Process Name	Version	Activity	Status	Resource	Time	Time Spent	Documents	Pages
Decision Process	5	Image Processing	Performed	TotalAgility	05/02/2018 10:27:17.597 AM	0.00:00:00.000	1	2

When an activity is in progress, the resource column displays the resource that has taken the activity. When an activity is not in progress, the resource column displays the resource or group assigned to the activity.

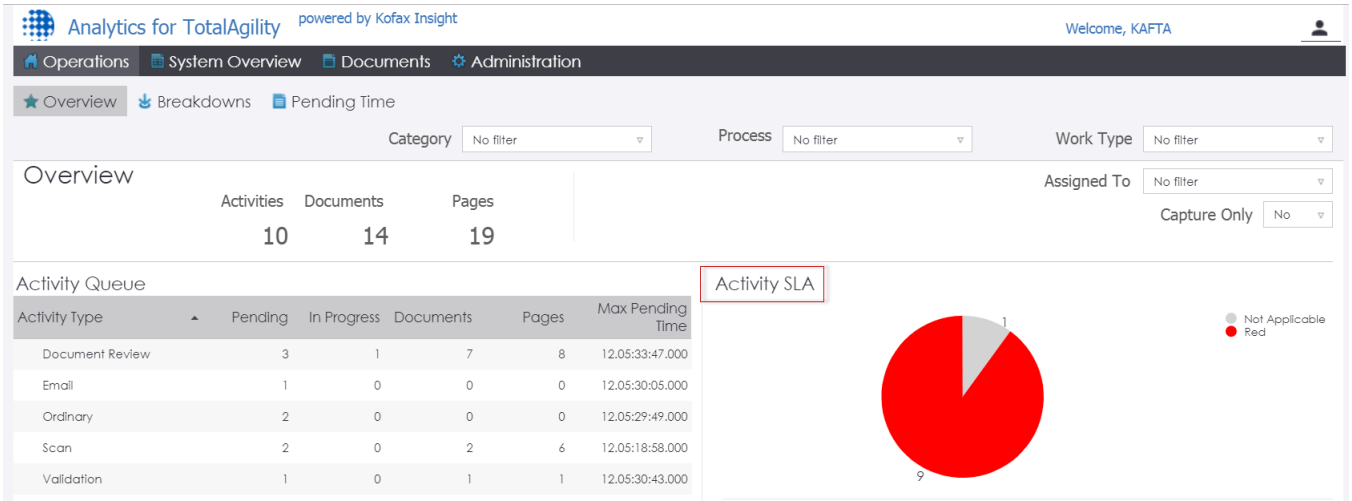
The Activity Queue uses information from the following metric:

Activity Due Max Pending Time: The maximum time each capture Activity Type has been pending.

Activity SLA

A graphical report (pie chart) that provides an overview of activities grouped by SLA (Green, Amber, Red and any additional levels added).

You can filter the activities by the category, process, work type, assigned to and capture only.

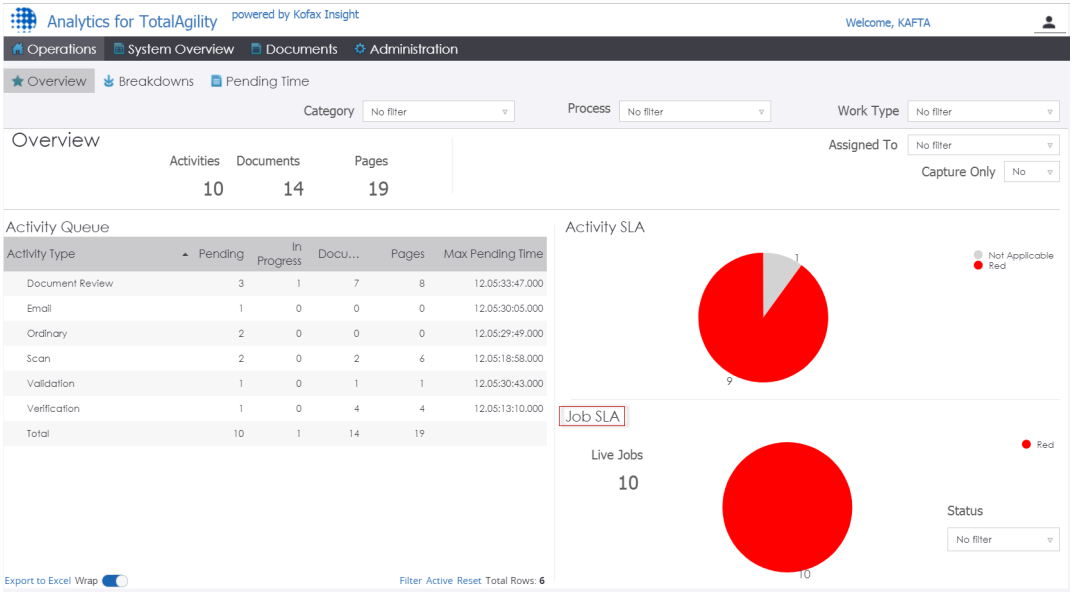


Click the Activity SLA chart to view a textual report that gives further details on the activities that include activity name, process name, job ID, due date, priority, assigned to, SLA, job SLA, job priority, case reference, document count and page count.

Job SLA

A graphical report (pie chart) that provides an overview of jobs grouped by SLA (Green, Amber, Red and any additional levels added).

You can filter the jobs by category, process, work type, assigned to, capture only and status such as active, or awaiting completion.



Click the Job SLA chart to view a textual report that gives further details on the jobs that include process, job ID, SLA, owner, priority, due date, state, status, case reference, creator, and version.

Breakdowns

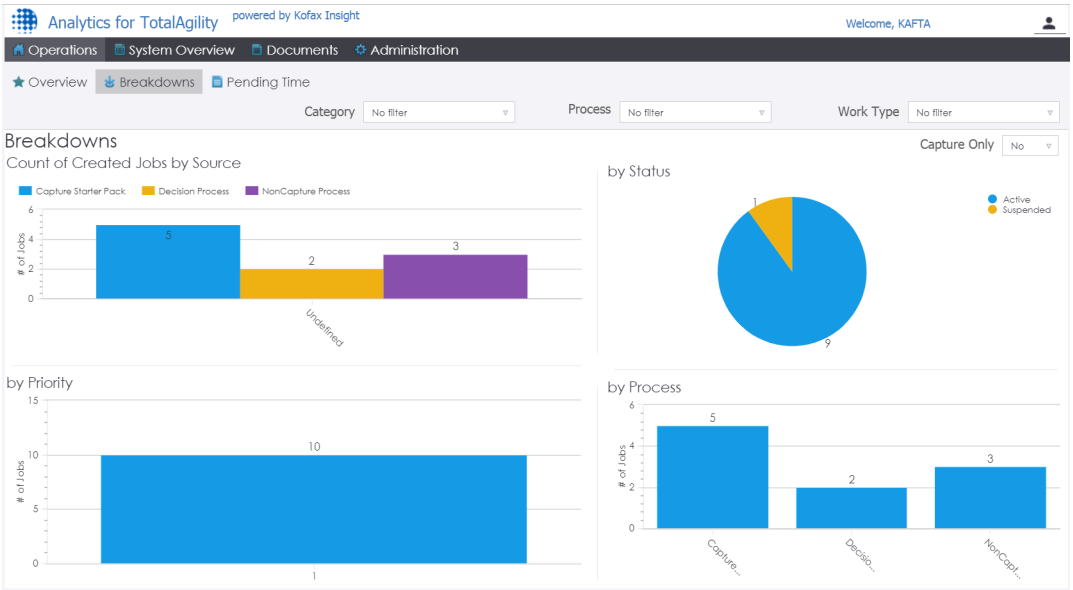
Use the Breakdowns view to perform an in-depth analysis of the data in the Overview based on a range of criteria.

You can view the breakdown of live jobs and completed jobs separately.

To view the breakdown of live jobs, navigate to **Operations** > **Breakdowns**.

Each chart on the Breakdowns view displays the breakdown of jobs split by corresponding dimensions: Source, Priority, Status, and Process.

You can filter the data by Category, Process, Work Type and Capture Only.



Jobs Created by Source

The Jobs Created by Source chart displays the breakdown of jobs created and their source in a graphical bar chart. This information is based on the live data. 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 We recommend that you update the job source as the first step within the business process.

Jobs by Status

The Jobs by Status chart displays all live jobs by status in a graphical pie chart.

Click on the pie chart to drill down by process or source. You can drill down on all jobs or specify a limit on number of jobs to drill down. For example, if you set the limit to 20, you can select to drill down the top 20 or bottom 20 jobs.

Select an area on the pie chart to drill down based on the following:

- **Process**: Displays a pie chart with the number of each job by process name grouped by status.
- **Source**: Displays a pie chart with the number of each job by source name grouped by status.

Click Home or back arrow to go back to the original chart.

Jobs by Priority

The Jobs by Priority chart displays the breakdown of the jobs created and their priorities in a graphical bar chart. This information is based on live data.

The bar chart displays the count of all jobs against the job priorities.

Select an area on the bar chart to drill down the data based on the following:

- **Process**: Displays a bar chart with the count of each job (by process name) grouped by priority.
- **Source**: Displays a bar chart with the count of each job (by source) grouped by priority.

Click Home or the back arrow to go back to the original chart.

Jobs by Process

The Jobs by Process chart displays the breakdown of the jobs created by process in a graphical bar chart. This information is only based on live data. The bar chart appears with the count of all jobs by process type.

Select an area on the bar chart to further drill down the data based on the following:

- **Source**: Displays a bar chart with the count of each job by source grouped by process.
- **Priority**: Displays a bar chart with the count of each job by priority grouped by process.

Click Home or the back arrow to go back to the original chart.

Pending Time

Use the Pending Time view to review the amount of work pending and the work that is not taken for a considerable amount of time. This helps the administrator to view current and historical bottlenecks in the system and identify any performance issues.

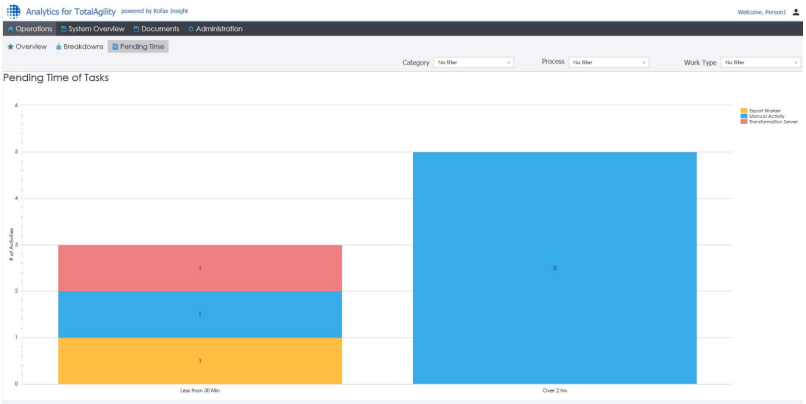
You can filter the data by category, process and work type.

To view the pending time, navigate to **Operations** > **Pending Time**.

A graphical bar chart provides an overview of pending time of tasks. The chart shows current activities of all types (capture, non-capture, manual and automatic) grouped by pending time for the following:

- Less than 30 Min
- Less than 1 hr but more than 30 Mins
- Less than 2 hrs but more than 1 hr

- Over 2 hrs



When you click an area on the chart, the Pending Time Details pop-up list displays further details on each of the activities. The details include Activity Name, Process Name, Job ID, Due Date, Priority, Assigned to, SLA, Document Count, and Page Count.

Pending Time Details

Activity Name	Process Name	Job ID	Due Date	Priority	Assigned To	SLA	Document Count	Page Count
ReScan	Decision Process	027584B9E8394FF7BD599	05/02/2018 10:33:30.910 AM	1	Everyone		1	4
Verification	Capture Starter Pack	20C6FF155006483BADFE	05/02/2018 10:31:47.850 AM	1	Everyone		4	4
Document Review	Capture Starter Pack	3AF14BB05FDA43AD81C	05/02/2018 10:31:14.757 AM	1	Everyone		2	3
ReScan	Decision Process	7FA447CF7C9341E1AA9	05/02/2018 10:27:13.270 AM	1	Everyone		1	2
Document Review	Capture Starter Pack	AB6C76AFD5C544BA9B4	05/02/2018 10:26:30.097 AM	1	Everyone		1	1
Ordinary	NonCapture Process	69451E858E31464E978C	05/02/2018 10:26:06.573 AM	1	Everyone		0	0
Ordinary	NonCapture Process	9147C9603C284185B293	05/02/2018 10:16:25.817 AM	1	Everyone		0	0
Validation	Capture Starter Pack	775A0CFAC31648CB95C	05/02/2018 10:14:30.907 AM	1	Everyone		1	1
Document Review	Capture Starter Pack	B839EA48139548F8A30A	05/02/2018 10:12:22.860 AM	1	Everyone		4	4
							14	19

System Overview

This menu includes the following submenus:

- Jobs
- Activities
- Resources

Jobs

The Jobs submenu includes the following views:

- Jobs
- Breakdowns
- Escalations
- Trending

Jobs

This view summarizes all completed jobs in the system.

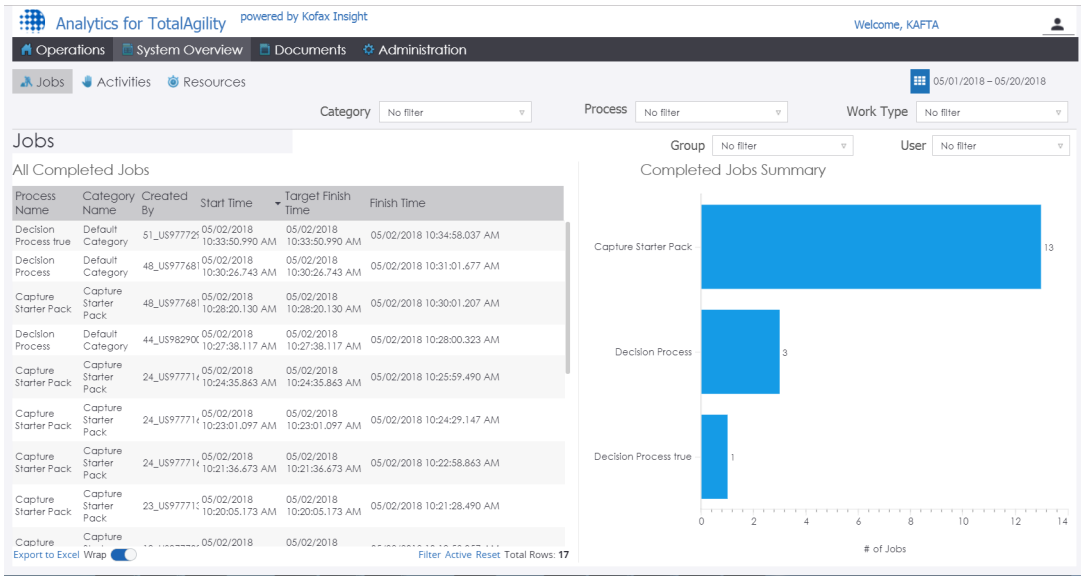
You can filter the data by group and user.

All Completed Jobs uses the following record:

Job Resource Completed: A list of Completed Jobs 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.

To view the summary of jobs, navigate to **System Overview** > **Jobs** > **Jobs**.



Breakdowns

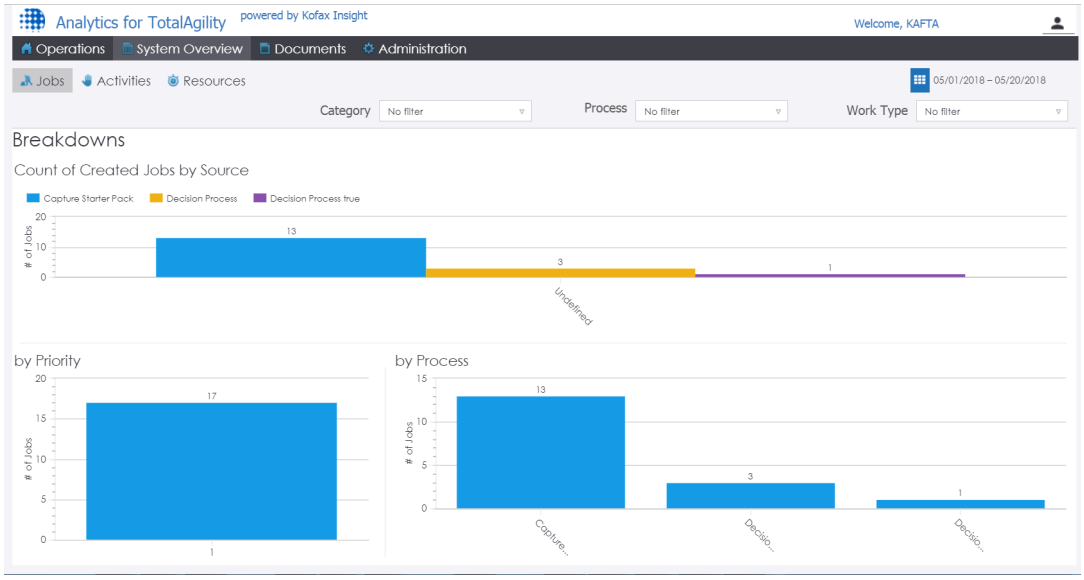
Use the Breakdowns view to perform an in-depth analysis of the data in the Overview based on a range of criteria.

You can view the breakdown of live jobs and completed jobs separately.

To view the breakdown of completed jobs, click **System Overview** > **Jobs** > **Breakdowns**.

You can filter the data by category, process, and work type.

Each chart on the Breakdowns view displays the breakdown of completed jobs split by corresponding dimensions: Source, Priority, and Process.



Count of Jobs Created by Source

The Count of Jobs Created by Source chart displays the breakdown of jobs created and their source in a graphical bar chart.

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 We recommend that you update the job source as the first step within the business process.

Jobs by Priority

The Jobs by Priority chart displays the breakdown of the jobs completed and their priorities in a graphical bar chart.

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

Select an area on the bar chart to drill down the data based on the following:

- **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 source) grouped by priority.

Click Home or the back arrow to go back to the original chart.

Jobs by Process

The Jobs by Process chart displays the breakdown of the jobs completed by process in a graphical bar chart. The bar chart appears with the count of all jobs by process type.

Select an area on the bar chart to drill down the data based on the following:

- **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.

Click Home or the back arrow to go back to the original chart.

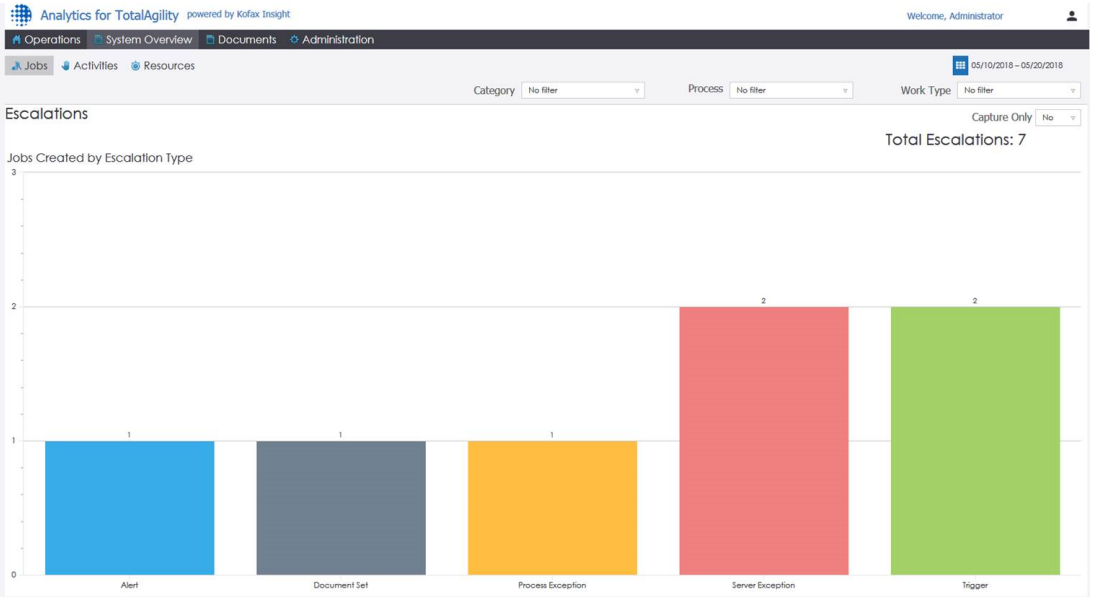
Escalations

Use the Escalations view to review all escalations raised within a specified period of time.

This view displays a graphical bar chart with jobs created and grouped by the following escalation types: Alert, Document Set (Document Due), Process Exception, Server Exception, and Trigger. The top view displays the total number of escalations.

To view the escalations, navigate to **System Overview** > **Jobs** > **Escalations**.

You can filter the data by Date, Category, Process, Work Type and Capture Only.



Click an escalation type on the bar chart to further drill down the data. For example, to view the jobs created by the Alert escalation type, click the Alert bar on the chart. The Jobs Created by Alert pop-up list displays a textual report that includes the creation date (sorted in descending order), process, job ID, priority, job owner and job SLA details.

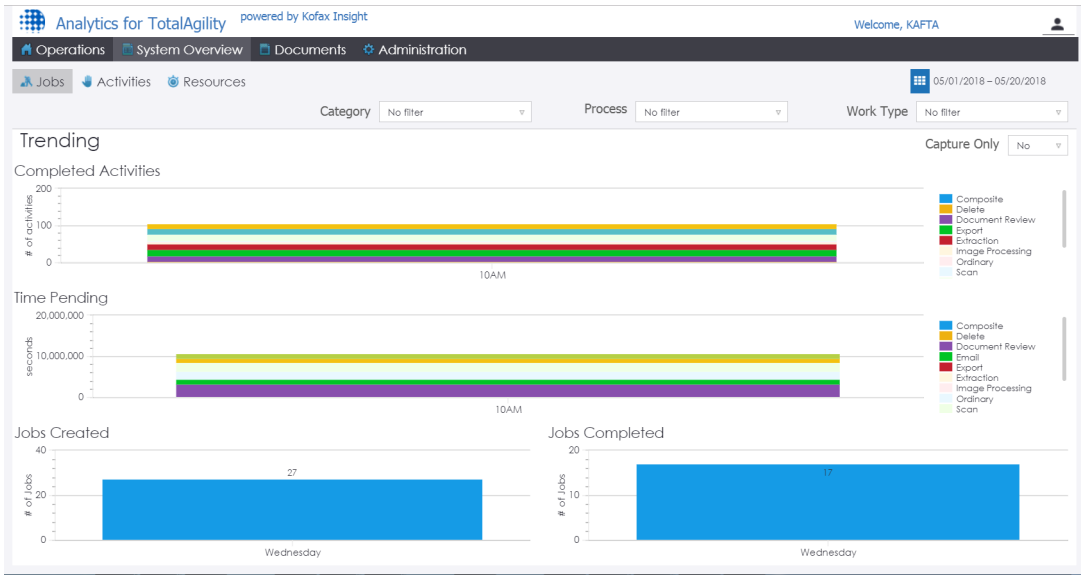
Trending

Use the Trending view to review the trending information for the documents processed in TotalAgility so that you can plan accordingly for staffing.

The Trending view displays the graphical bar charts for created jobs, completed activities, and for how long the activities were pending. This information includes both capture and non-capture activities.

You can filter the data by Date, Category, Process, Work Type and Capture Only.

To view the trending of activities and jobs, navigate to **System Overview** > **Jobs** > **Trending**.



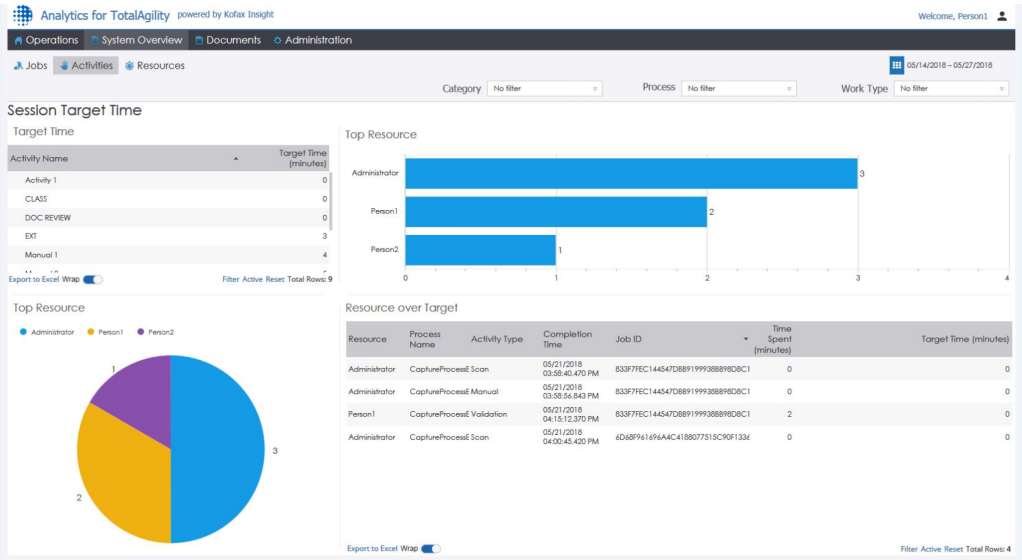
View/Chart	Description	Updates
Completed Activities	The breakdown of activities completed on an hourly basis. A stacked bar chart appears with the count of all completed activities for each hour. For example, at 10 AM there are 3 validation activities and 7 document review activities completed. Click an area on the bar chart to view the hourly breakdown for that activity type.	Hourly
Time Pending	A stacked bar chart displays the time when the activities became pending and for how long the activities were pending. This information is a combination of live and historical data and is updated periodically. Click an area of the bar chart to view the hourly breakdown of data for the activity type. You can further filter the jobs by pending/completed activities.	Hourly

View/Chart	Description	Updates
Jobs Created	A bar chart displays the breakdown of jobs created by each day of the week. Click an area on the bar chart to drill down the data based on the following: • **Process**: Displays the daily breakdown for a specific process. • **Hour of Day**: Displays the job count and the hourly breakdown. Click Home or the back arrow to go back to the original chart.	Hourly
Jobs Completed	A bar chart displays the breakdown of jobs completed each day of the week. Click an area on the bar chart to drill down the data based on the following: • **Process**: Displays process type and the daily breakdown. • **Hour of Day**: Displays the job count and the hourly breakdown. Click Home or back arrow to go back to the original chart.	Daily

Activities

Use the Activities submenu to access the Session Target time view that gives details related to performance of resources in completing the activities.

To access the view, navigate to **System Overview** > **Activities** > **Session Target Time**.



Session Target Time

Displays the textual chart with session target time associated with each activity.

Target Time uses information from the following metrics:

Activity Target Time: Sums of Expected Duration in seconds for activities grouped by activity type.

Top Resource

Displays the pie and bar charts for the top resources who perform the activities in less time than the target time. Click an area on the bar chart or pie chart to drill down the information by category, process activity, day of week, and time.

Top Resources uses information from the following metrics:

Activity Completed Early Count: Information pertaining to activities where the WORKING_TIME_SPENT < EXPECTED_DURATION_IN_SECONDS.

Resource over Target

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

Resources over Target uses the following record:

Activity Completed Late: A list of completed activities where the working time spent is greater than the expected duration.

Resources

The Resources submenu includes the following views:

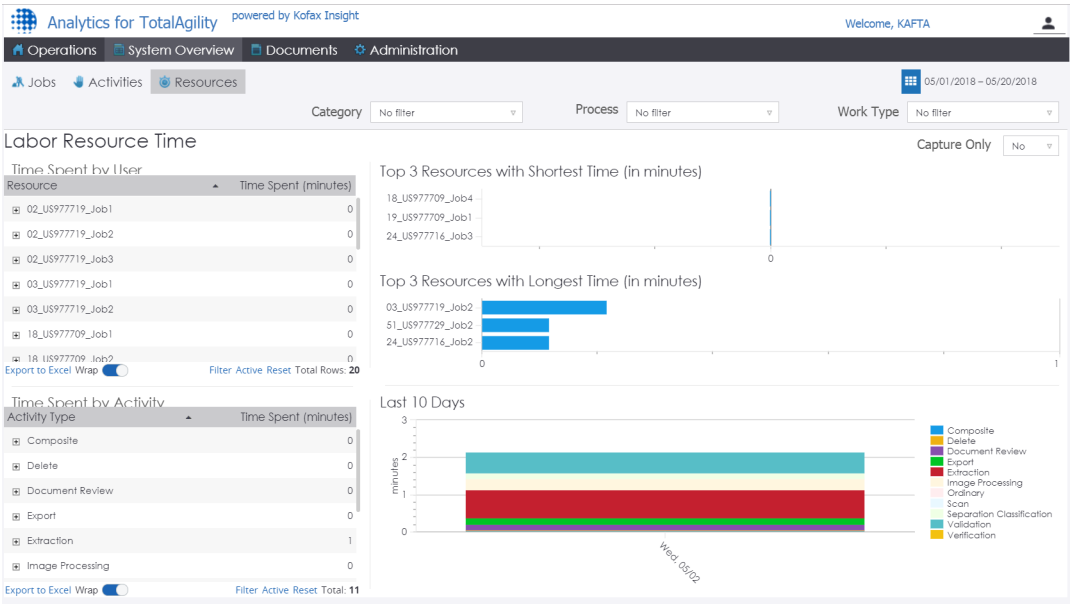
- Time
- Cost
- Resources

Time

Use the Labor Resource Time view to analyze how resource and cost impact your operation. You can review the breakdown of time spent by the resource on each activity in minutes.

You can filter the data by date, category, process, work type and capture only.

To view resource time details, navigate to **System Overview** > **Resources** > **Time**.



This view displays the labor resource time split by the corresponding dimensions: Time Spent by User, Top 3 Operators with Shortest Time, Top 3 Operators with Longest Time, Time Spent by Activity and Last 10 Days.

View/Chart	Description
Time Spent by User	Displays a textual chart that includes time (in minutes) spent by user on each activity. Time Spent by User uses information from the following metrics: Activity Completed Time Exclude TotalAgility: The completed activities not performed by the system resource.
Time Spent by Activity	Displays a textual chart that includes time spent by each activity in minutes. Time Spent by Activity uses information from the following metrics: Activity Completed Time: The total working time spent on completed activities grouped by Activity Type. You can further break it down by Day of week, Hour of day, Process or Operator.
Top 3 Resources with Shortest Time (in minutes)	Displays a bar chart that includes top three resources who have spent the least amount of time working on activities. Click an area on the chart to further drill down the data by Activity Type, Category, isCapture and Process. Top 3 resources with Shortest Time (in minutes) uses information from the following metrics: Activity Completed Time Exclude TotalAgility: The completed activities not performed by the system resource.

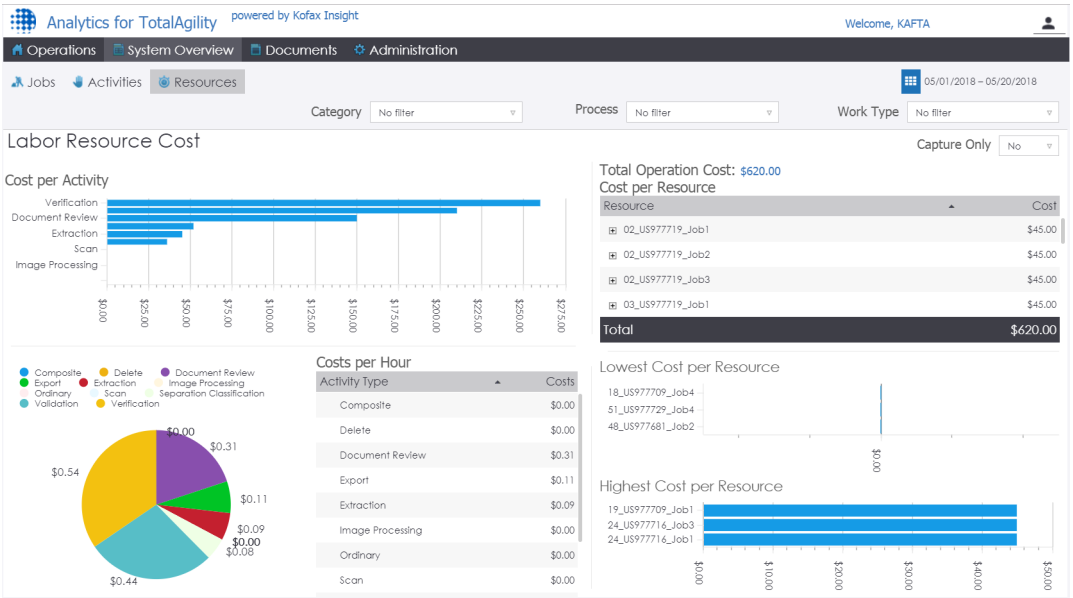
View/Chart	Description
Top 3 Resources with Longest Time (in minutes)	Displays a bar chart that includes the top three resources who have spent the maximum amount of time working on activities. Click an area on the chart to further drill down the data by Activity Type, Category, isCapture and Process. Top 3 Resources with Longest Time (in minutes) uses information from the following metrics: Activity Completed Time Exclude TotalAgility: The completed activities not performed by the system resource.
Last 10 Days	Displays a bar chart that include the time spent on each activity in the past 10 days. Click an area on the bar chart to further drill down the data by either of the following: • **Day of week**: Displays the time spent on activities for each day of week. • **Hour of day**: Displays the time spent on activities for each hour of day. • **IsCapture**: Displays the time spent only on activities for the last 10 days. • **Operator**: Displays the time spent on activities for each operator. • **Process**: Displays the time spent on activities for each process. Last 10 Days uses information from the following metrics: Activity Completed Time: The total working time spent on completed activities grouped by Activity Type. You can further break it down by Day of week, Hour of day, Process or Operator.

Cost

Use the Labor Resource Cost view to analyze overall operational labor costs grouped by module and operator. You can also view labor cost comparisons of top five operators.

You can filter the data by category, process, work type and capture only.

To view the labor cost details, navigate to **System Overview** > **Resources** > **Cost**.



Cost per Activity

The bar and pie charts display 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.

Costs per Hour

A textual chart 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.

Total Operation Cost

A textual chart 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.

Lowest Cost per Resource

A bar chart displays the three least costly resources. Hover the mouse on the bar for details on the time frame and cost.

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 Resource

A bar chart displays the three most costly resources. Hover the mouse on the bar for details on time frame and cost.

Highest Cost per Operator uses information from the following metrics:

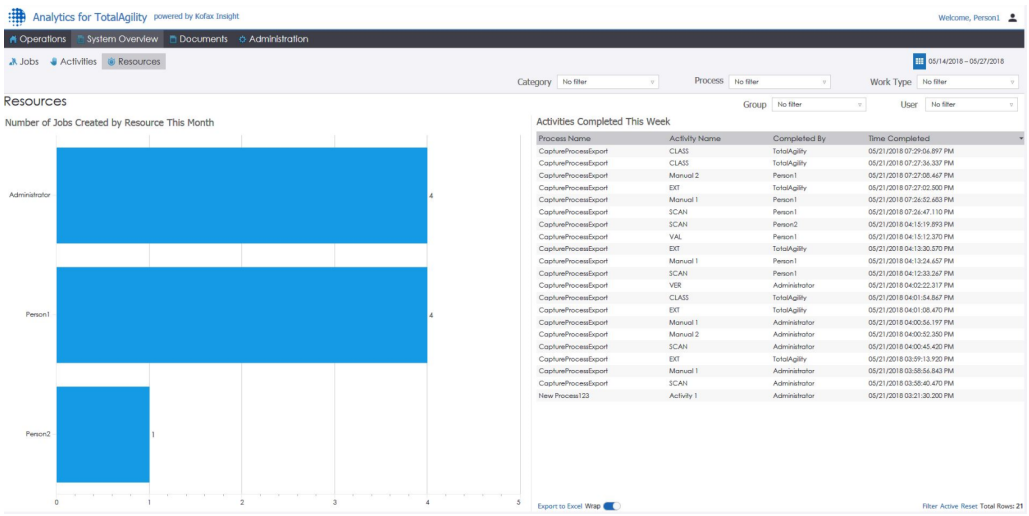
Activity Completed Cost Exclude TotalAgility: Similar to Activity Completed Cost but activities completed by the System resource are not included.

Resources

Use the Resources view to review the number of jobs created by a resource in a month and the summary of all activities completed by each resource from the beginning of the week until the current date.

To view the resource summary, navigate to **System Overview** > **Resources** > **Resources**.

You can filter the data by category, process, work type, group and user.



Number of Jobs Created by Resource This Month

A bar chart displays the 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

A textual chart displays the summary of all the 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.

Documents

The Documents menu includes the following submenus:

- Processing
- Classification
- Extraction

If the process data does not exist for a document, the Documents views in Kofax Analytics for TotalAgility show the related process and activity names as [Not Available]. The scenarios that could cause this include the following:

- When API's are called outside of a process.
- If Include in Analytics flag is not set on a process.
- If documents are deleted before the job is created (SCNJ/DCNJ).
- When the number of pages in a document change and then the document is deleted in the same session.
- When job results are terminated in the Document Overview | Activity name to display not available.

Processing

This submenu includes the following views:

- Document Trending
- Document Search
- Deleted Documents and Pages
- Rejections
- Resource Productivity
- Document Processing Time
- No Touch Processing

You can filter the data by category, classification group, extraction group and document type.

Document Trending

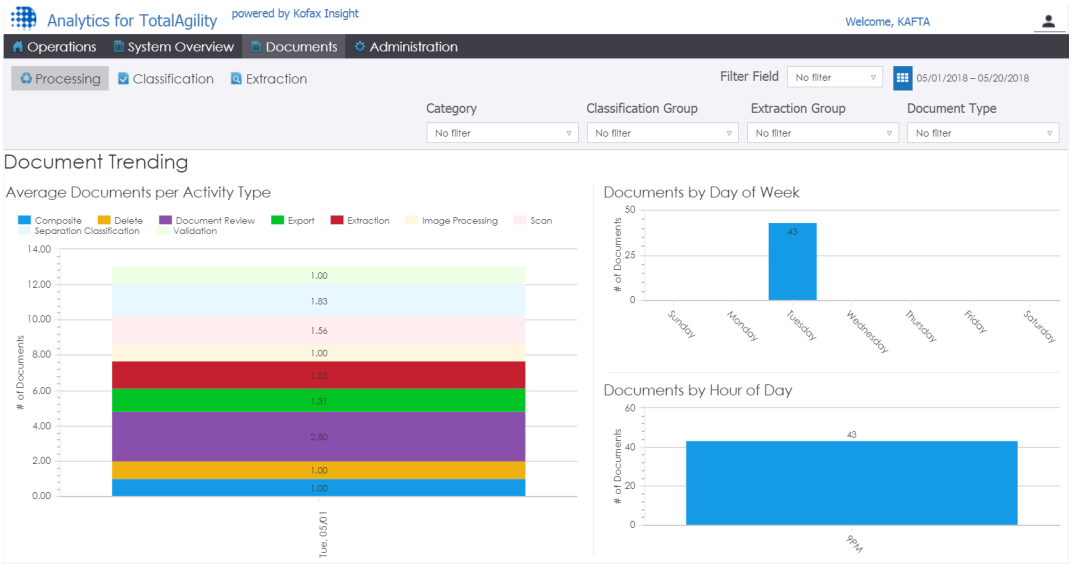
Use the Document Trending view to review the document trends per session, by day of the week, or per hourly for a specific day of the week. This view shows the trending information for documents processed in TotalAgility so that you can plan accordingly for staffing.

To view the document trends, navigate to **Documents** > **Processing** > **Document Trending**.

The Document Trending view displays the following graphical bar charts:

- **Average Documents per Activity Type**: Displays the count of distinct documents grouped by type of completed capture activities. The global date range determines whether the chart is drilled down by year, month, day or hour. For example, the X-axis shows the data by hours when filtering for only a day's worth of data, and shows the data by dates when filtering the data for a month.
- **Documents by Day of Week**: Displays the count of distinct documents grouped by the day of the week they were created in TotalAgility during the selected date range. For example, a count for Tuesday is not only the most recent Tuesday, but all Tuesdays during the selected date range.
- **Documents by Hour of Day**: Displays the count of distinct documents for each hour of day created in TotalAgility. For example, at 9 PM there are 20 validation activities and 20 document review activities completed. Click an area on the bar chart to view the hourly breakdown for that activity type.

You can filter the data by category, classification group, extraction group and document type.



Click an area on the Documents by Day of Week and Documents by Hour of day charts to further drill down the data by document type, activity type, day of week, document type, machine name, and process. You can drill down the data on all jobs, or specify a limit to drill down on number of jobs from top or bottom. For example, if you set the limit to 20, you can drill down the top 20 or bottom 20 jobs.

Note When you create documents in TotalAgility using a scanner or MFP, the name of the machine used for scanning is displayed in the Documents by Day of Week and Documents by Hour of day charts.

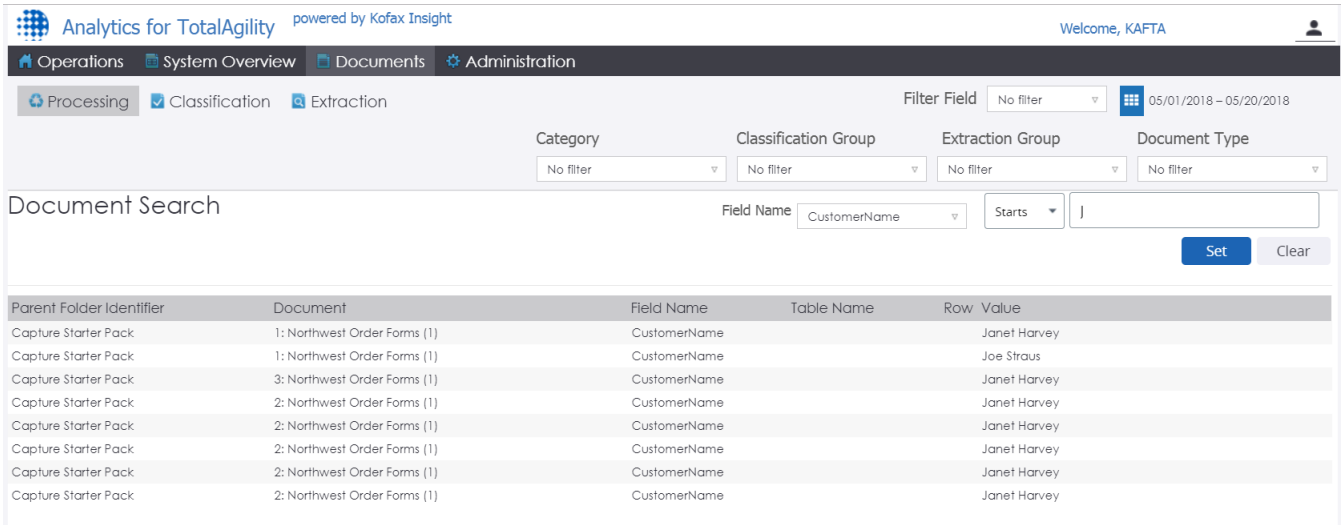
Document Search

Use the Document Search view to look for documents based on the field names and field values so that you can quickly find details related to the processing of the document in TotalAgility.

To search for the documents, navigate to **Documents** > **Processing** > **Document Search**.

By default, the results page is empty. When the capture processing is complete through TotalAgility, the field names are available on the Field Name list in the Document Search view. Provide the field name and value as the search criteria to view the results. You can select multiple fields to search. If you select at least one field, all the documents containing the field and matching the search criteria are displayed.

The search results matching the criteria include the following columns: Parent Folder Identifier, Document, Field Name, Table Name, Row, and Value.



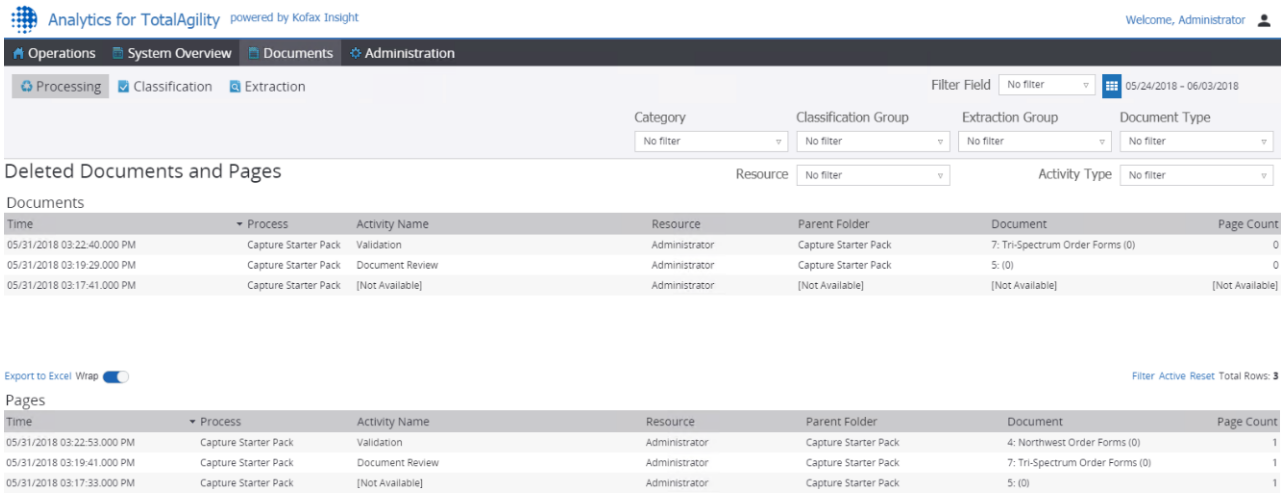
Click a row in the search results to view the details for the selected document in the Document Overview pop-up. This pop-up has information grouped under the following tabs: General, Capture Activities, Capture Events, Field Changes and Field Values.

Deleted Documents and Pages

Use the Deleted Pages and Documents view to see all documents and pages deleted from the system so that there is visibility into documents and pages that are being deleted by resources in TotalAgility. You can also view details about deleted documents and pages.

Use the Resource and Activity Type page level filters to filter the data. If you change the global date filter, the filter is applied to the activity end date.

To view the list of deleted documents and pages, navigate to **Documents** > **Processing** > **Deleted Documents and Pages**.



This view displays two grids:

- The top grid lists the deleted documents with the following details: Time, Process, Activity Name, Resource, Parent Folder, Document and Page Count. Click a row in the Documents grid to display the document overview of the selected document in a separate window. The Document Overview pop-up includes the information grouped under the General, Capture Activities, Capture Events, Field Changes and Field Values tabs.
- The bottom grid lists the deleted pages with the following details: Time, process, activity name, resource, document type and page count. Click a row in the Pages grid to display the document overview for the selected page in a separate window. The Document Overview pop-up includes the information grouped under the General, Capture Activities, Capture Events, Field Changes and Field Values tabs.

Note Configure an alert in Insight Admin Console for deleted documents and/or pages so that an alert is triggered in Kofax Analytics for TotalAgility after documents/pages are deleted by a resource who performs a manual activity in TotalAgility.

Rejections

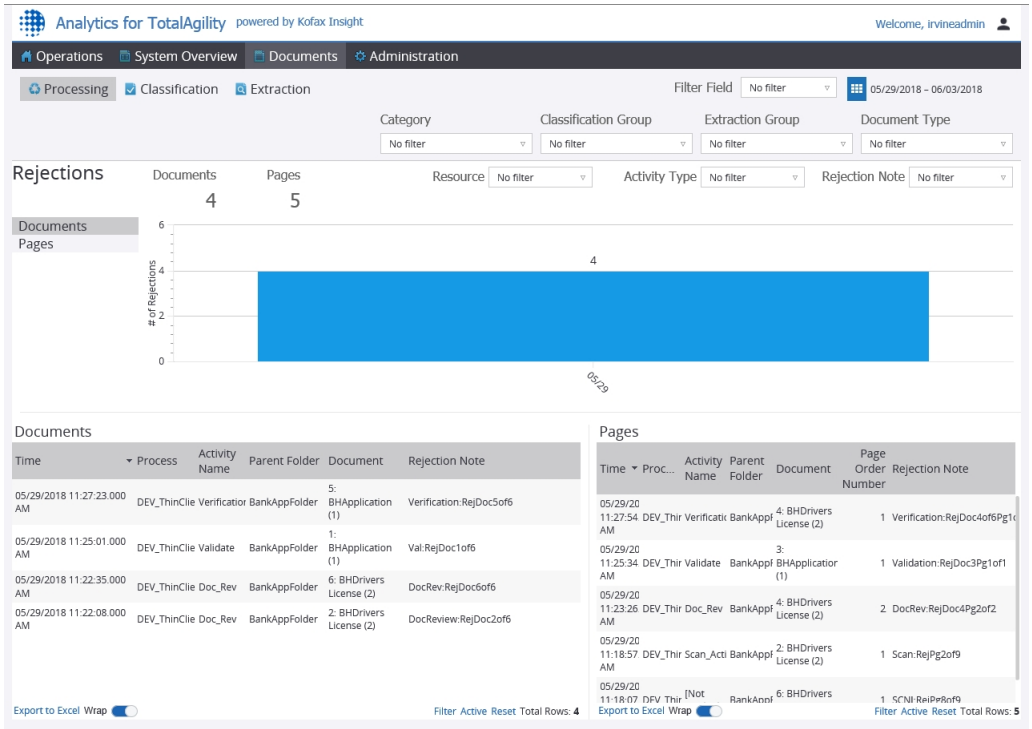
Use the Rejections view to get details related to documents, or pages that are rejected during processing so that you can quickly identify patterns and correct issues causing the rejections.

This view displays a graphical chart with rejections trending over time. You can view the documents and pages that are rejected in TotalAgility even if the document has not completed capture processing.

Note If a document or page is rejected and then unrejected within the same session before completing the activity, the rejected page or document is counted as rejection and appears in the Rejections view.

Change the date filter to filter the data by the event date. You can filter the data by Category, Classification Group, Extraction Group, Document Type, Resource, Activity Type, and Rejection Note.

To view the list of rejected documents and pages, navigate to **Documents** > **Processing** > **Rejections**.



Two separate grids appear that list the rejected documents, and pages that include the following details:

- **Documents**: This grid displays the event date time, process, activity name, document, parent folder, document, and rejection note.

  In the Documents grid, click a row to display the Document Overview for the selected document in a separate window. This pop-up has information grouped under the following tabs: General, Capture Activities, Capture Events, Field Changes and Field Values.

- **Pages**: This grid displays the event date time, process, activity name, document, page order number, and rejection note.

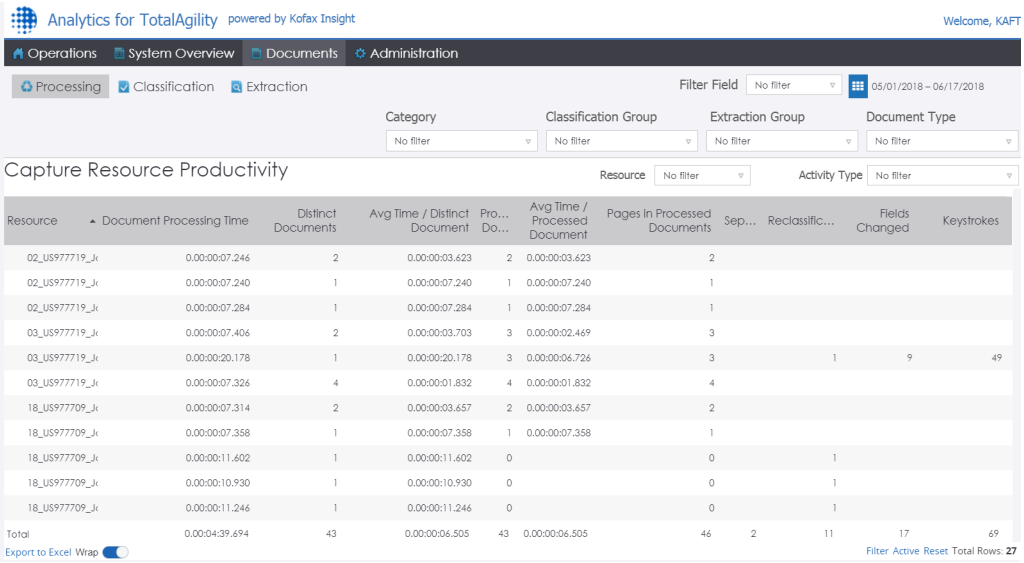
  In the Pages grid, click a row to display the Document Overview in a separate window. This window has information grouped under the following tabs: General, Capture Activities, Capture Events, Field Changes and Field Values.

Resource Productivity

The Capture Resource Productivity view displays a report that provides an overview of the number of documents processed by a resource in a given date/time period. The report reflects capture events such as processed documents, separation corrections, reclassifications, and changed fields.

You can filter the data by Category, Classification Group, Extraction Group, Document Type, Resource and Activity Type.

To view the productivity of a resource, navigate to **Documents** > **Processing** > **Resource Productivity**.



The Capture Resource Productivity report displays the following details: Resource, Document Processing Time, Distinct Documents, Avg Time/ Processed Document, Pages in Processed Documents, Separations, Reclassifications, Fields Changed, and Keystrokes.

Click a row in the Capture Resource Productivity grid to view the productivity details for the selected resource in a separate window. For example, to view the productivity details of Administrator, click Administrator in the grid. The Productivity Details for Administrator window includes the following details: Process, Activity Name, Activity Type, Time, Document Processing Time, Processed Documents, Average Time/Processed Document, Pages in Processed Documents, Separations, Reclassifications, Fields Changed, and Keystrokes.

The bottom of grid displays the total for the following fields: document processing time, number of documents, average time for processing documents, pages in processed documents, separations, fields changed and keystrokes.

Note the following:

- When a resource logs into any manual capture activity, the session times are cumulative for that resource.
- When a resource confirms a document type in a manual activity such as Document Review, the count of processed documents are incremented.
- When a resource corrects a separation error in any manual activity, the count of separations is incremented.
- When a resource reclassifies a document in any manual activity, the count of reclassifications is incremented.
- When a resource corrects a document index field in a manual activity, the count of fields changed is incremented.

Productivity Details for 51_US977729_Job2

Process	Activity Name	Activity Type	Time	Document Processing Time	Proces... Docu...	Avg Time / Processed Document	Pages in Processed Documents	Separati...	Reclas...	Fields Changed	Keystrokes
Capture Starter Pack	[Not Available]	Scan	05/01/2018 08:31:47.833 PM	0.00:00:07.282	4	0.00:00:01.821	4				
Capture Starter Pack	Document Review	Document Review	05/01/2018 08:32:36.317 PM	0.00:00:01.474	1	0.00:00:01.474	1	1	1		
Capture Starter Pack	Document Review	Document Review	05/01/2018 08:32:36.317 PM	0.00:00:03.046	1	0.00:00:03.046	1				
				0.00:00:11.802	6	0.00:00:01.967	6	1	1		

To further drill down the data, click a row in the Productivity Details for <Resource> grid. The Capture Activity Overview displays the details for the selected capture activity and the associated documents and events. The data in this report shows all sessions from manual capture activities and include live documents. Separate grids are displayed for the documents and events.

Capture Activity Overview

Process
Activity Name
Activity Type
Priority
Resource
Time
Processing Time
Status
Machine Name

Documents

Parent Folder ID	Document	Separation Corrections	Reclassified	Fields Changed

Export to Excel Wrap

Filter Active Reset Total Rows: 0

Events

Document	Event Type	Old Value	New Value

In the Documents grid, or Events grid, click a row to display the Document Overview for the selected document or event in a separate window. This window includes information grouped under the following tabs: General, Capture Activities, Capture Events, Field Changes and Field Values.

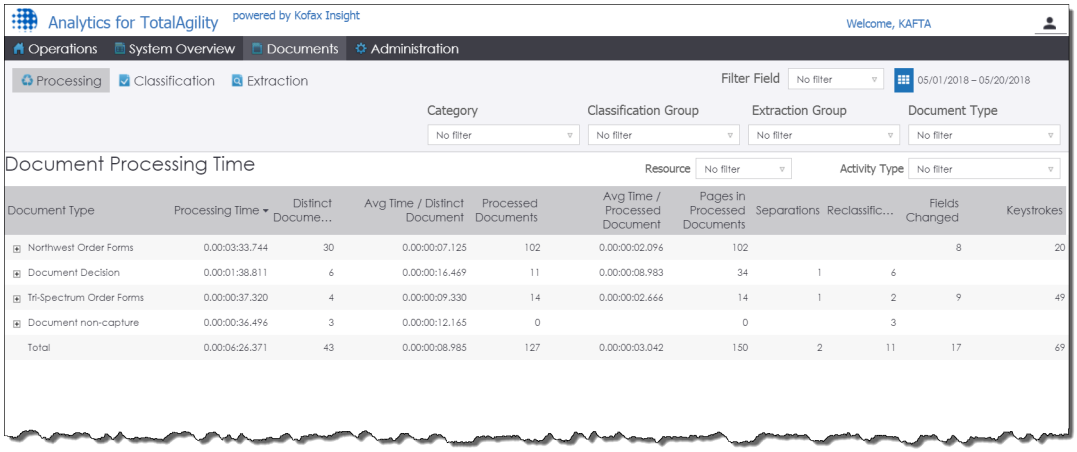
Document Processing Time

Use the Document Processing Time view to review the time taken by the documents to complete processing in TotalAgility. This view displays the processed documents for interactive activities. The processed documents for automatic activities are not displayed.

The textual chart displays the total and average processing time, separations, reclassifications and fields changed. TotalAgility reflects the clock time for the activities; whereas, the document processing time in Kofax Analytics for TotalAgility reflects the total processing time of documents and includes the corrections and time spent viewing each document. For example, if an activity processed three documents, the document processing time would be the sum of the processing time for all the three documents.

You can filter the data by Category, Classification Group, Extraction Group, Document Type, Resource (multi-select and search) and Activity Type.

To view the processing time of documents, navigate to **Documents** > **Processing** > **Document Processing Time**.



Document Type	Processing Time	Distinct Docume...	Avg Time / Distinct Document	Processed Documents	Avg Time / Processed Document	Pages in Processed Documents	Separations	Reclassific...	Fields Changed	Keystrokes
Northwest Order Forms	0.00:03:33.744	30	0.00:00:07.125	102	0.00:00:02.096	102			8	20
Document Decision	0.00:01:38.811	6	0.00:00:16.469	11	0.00:00:08.983	34	1	6		
Tri-Spectrum Order Forms	0.00:00:37.320	4	0.00:00:09.330	14	0.00:00:02.666	14	1	2	9	49
Document non-capture	0.00:00:36.496	3	0.00:00:12.165	0		0		3		
Total	0.00:06:26.371	43	0.00:00:08.985	127	0.00:00:03.042	150	2	11	17	69

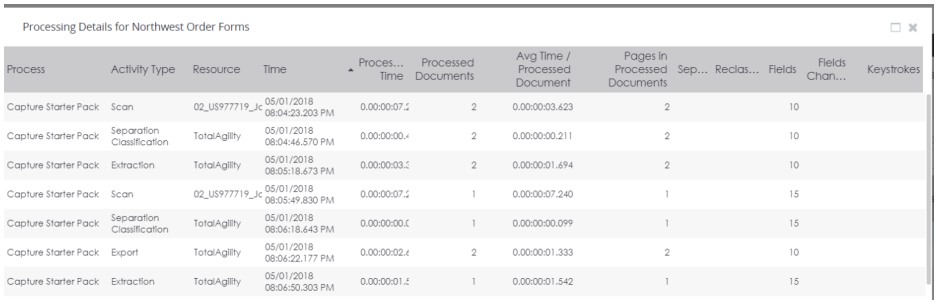
The Document Processing Time view displays the following details: Document type, Processing Time, Distinct Documents, Avg Time/Distinct Document, Processed Documents, Avg Time/Processed Document, Pages in Processed Documents, Separations, Reclassifications, Fields Changed and Keystrokes.

Each row in this view represents a document type. Expand any row to view the resource names and the total processing time. Click a document type or resource to drill down to document processing details, and then drill further to the Capture Activity Overview as needed. The Capture Activity Overview lists the details of the selected capture activity and the associated documents and events.

Processing Details pop-up

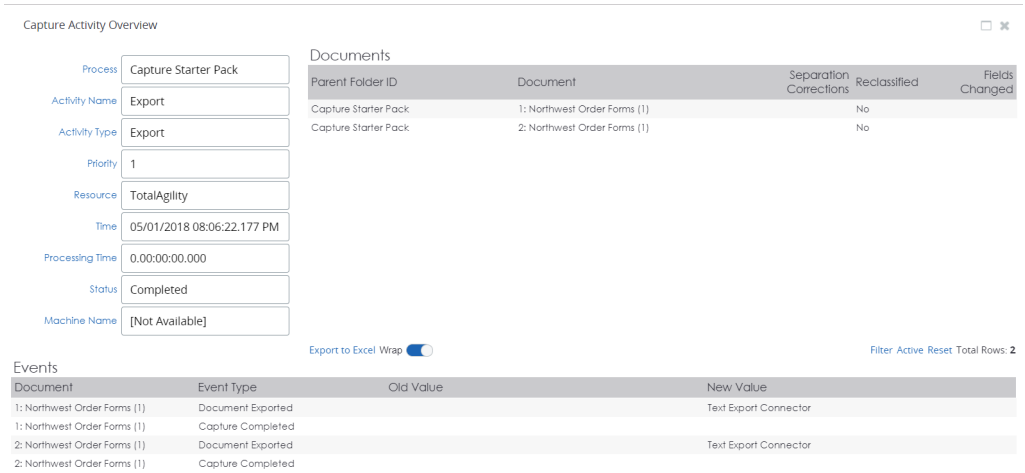
Click a row in the Document Processing Time grid to view details for the aggregated data in the Processing Details for <Document Type> pop-up. If you expand any row for the document type and click the resource name, the Processing Details for <Resource; Document Type> pop-up appears.

The pop-up displays the following details: Process, Activity type, Resources, Time, Processing Time, Processed Documents, Average Time/Processed Documents, Pages in Processed Documents, Separations, Reclassifications, Fields Changed and Keystrokes.



Process	Activity Type	Resource	Time	Proces... Time	Processed Documents	Avg Time / Processed Document	Pages in Processed Documents	Sep...	Reclas...	Fields	Fields Chan...	Keystrokes
Capture Starter Pack	Scan	02_US977719_Jc	05/01/2018 08:04:23.203 PM	0.00:00:07.2	2	0.00:00:03.623	2			10		
Capture Starter Pack	Separation Classification	TotalAgility	05/01/2018 08:04:46.570 PM	0.00:00:00.4	2	0.00:00:00.211	2			10		
Capture Starter Pack	Extraction	TotalAgility	05/01/2018 08:05:18.673 PM	0.00:00:03.3	2	0.00:00:01.694	2			10		
Capture Starter Pack	Scan	02_US977719_Jc	05/01/2018 08:05:49.830 PM	0.00:00:07.2	1	0.00:00:07.240	1			15		
Capture Starter Pack	Separation Classification	TotalAgility	05/01/2018 08:06:18.643 PM	0.00:00:00.0	1	0.00:00:00.099	1			15		
Capture Starter Pack	Export	TotalAgility	05/01/2018 08:06:22.177 PM	0.00:00:02.4	2	0.00:00:01.333	2			10		
Capture Starter Pack	Extraction	TotalAgility	05/01/2018 08:06:50.303 PM	0.00:00:01.5	1	0.00:00:01.542	1			15		

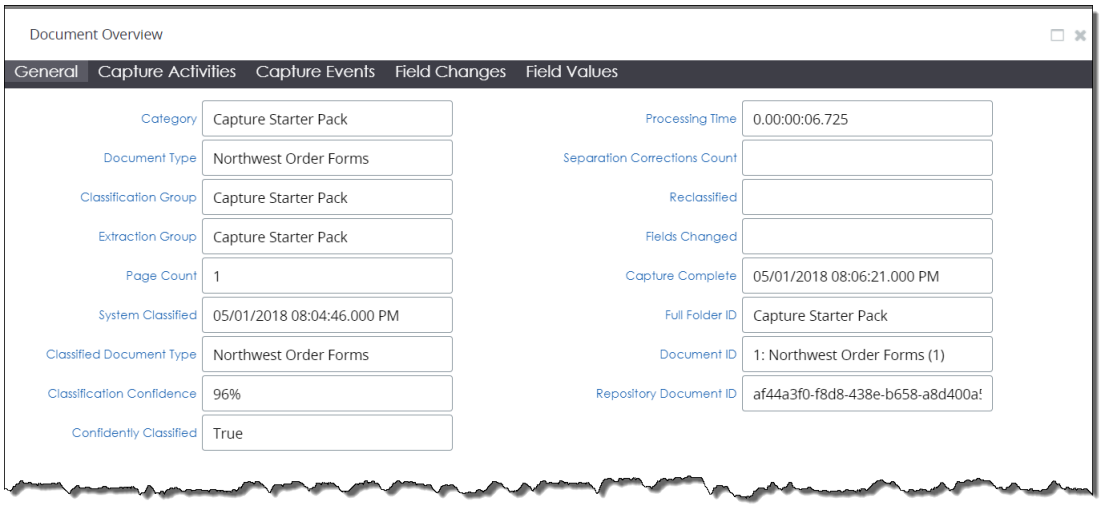
To further drill down the data, click a row in the Processing Details window. The Capture Activity Overview appears in a separate window, showing the details of the selected capture activity and the associated documents and events. Separate grids are displayed for the documents and events.



In the Documents grid or Events grid, select a row to display the document overview for the selected document or event. The Document Overview pop-up includes information grouped under following tabs: General, Capture Activities, Capture Events, Field Changes and Field Values.

Document Overview window

The Document Overview provides an audit trail for a specific document so that you can easily view the changes made to the document in TotalAgility. The Document Overview window displays only one document overview at a time. If you select a different document from a subsequent activity overview, it does not contain any data.



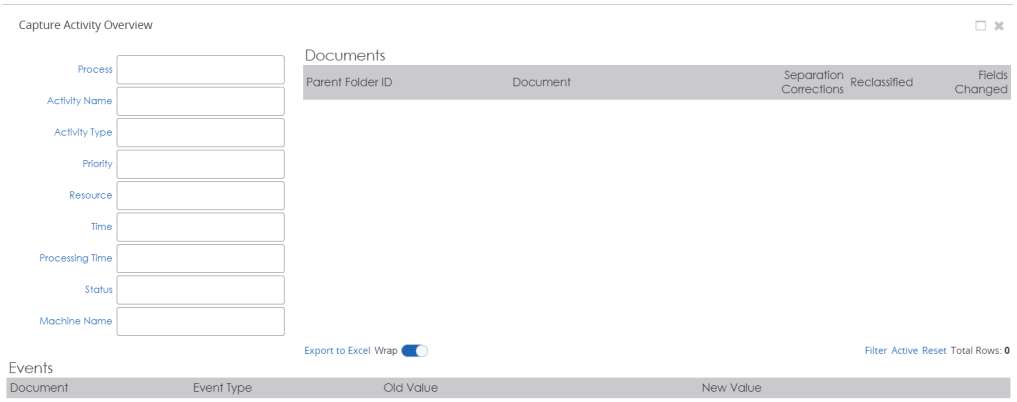
The Document Overview window information is grouped under the following tabs:

Tab	Information
General	This tab displays the following information: • Category • Document Type • Classification Group • Extraction Group • Page Count • System Classified • Classified Document Type • Classified Confidence • Confidently Classified • Processing Time • Separation Corrections Count • Reclassified • Fields Changed • Capture Complete (Date/time) • Full Folder ID • Document ID • Repository Document ID
Capture Activities	This tab displays two grids: The top grid provides the list of capture activities that touched the document including the following details: • Process Name • Activity • Activity Type • Time • Processing Time When you select an activity in the top grid, the bottom grid displays the activity sessions for the selected activity, including the following details: • Process Name • Activity • Activity Type • Resource • Time • Processing Time (Total time spent) In the Activity Sessions grid, select a session to view the details of the selected capture activity (session) and the associated documents and events in the Capture Activity Overview.

Tab	Information
Capture Events	This tab displays the events related to classification, separation, field changes, deletions, rejections and capture complete documents: • Activity Start Time, Date • Event Type • Activity Type • Activity Name • Resource • Old Value • New Value When you select an activity (session) in the grid, details and the associated documents and events appear in the Capture Activity Overview.
Field Changes	This tab displays the list of fields changed, including the following details: • Time • Field Name • Old Value • New Value • Resource • Activity Name
Field Values	This tab displays the list of all document fields sorted by field name, including the following details: • Field Name • Table Name • Row • Value

Capture Activity Overview

The Capture Activity Overview displays the details for a specific activity (session) in Kofax Analytics for TotalAgility so that you can easily see the events that have occurred in TotalAgility, which resource is associated in which activity, when did the event occur and from which workstation. The Capture Activity Overview displays all the documents that have been touched for a given job, but the Document Overview will be displayed only for the selected document. If you select a different document from a subsequent activity overview, it does not contain any data.



When you select an activity session, the Capture Activity Overview lists the following information in a separate window:

- Process
- Activity Name
- Activity type
- Priority
- Resource
- Time
- Processing time
- Status
- Machine Name (usually it is TotalAgility server, but for scanning it should be the scan station)

Separate grids are displayed for the documents and events. When the activity processes documents, the list of documents processed by the activity are displayed in the documents grid, which lists each document by parent folder ID, document name, separation corrections, reclassification and count of field changes.

In the Documents grid, or Events grid, click a row to display the Document Overview for the selected document or event. The Document Overview includes information grouped under the following tabs: General, Capture Activities, Capture Events, Field Changes and Field Values.

No Touch Processing

Use the No Touch Processing view to examine the ratio of items processed without manual corrections relative to the total number of documents processed. You can see details for documents in the No Touch Processing view so that you can validate that the information in the chart.

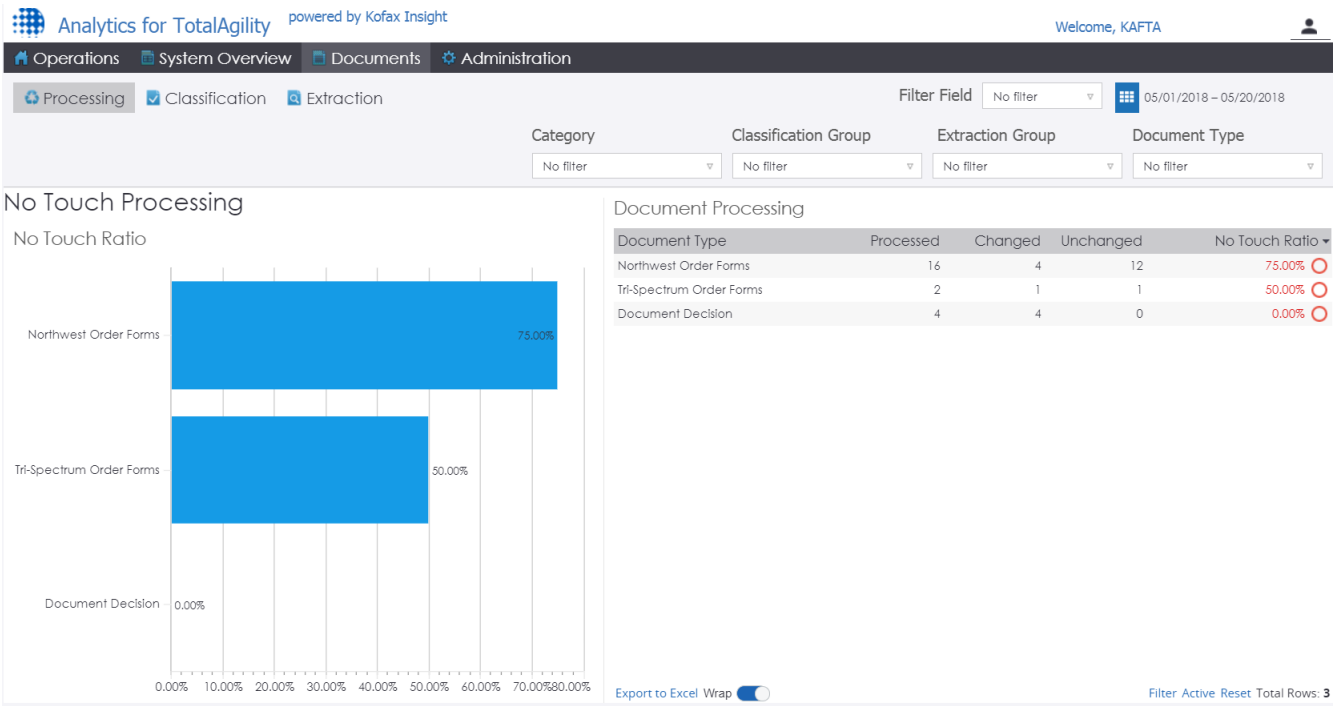
This view displays a graphical chart that shows the number of documents that complete capture processing without any changes by resources for manual activities. The data is based on completed documents, filtered by completion date, and grouped by document type.

Before completing capture processing, when any of the following occurs in a document in a manual activity, it is considered as touched:

- Separations (split, merged, page moved)
- Reclassified
- Field changed

You can filter the data by Category, Classification Group, Extraction Group, and Document Type.

To view the number of documents that complete capture processing, select **Documents** > **Processing** > **No Touch Processing**.



Click a row in the Document Processing grid to display the No Touch Details for <Document Type> window.

No Touch Details

When you click a row in the Document Processing grid, the details for the selected document appear in the No Touch Details for <Document Type> window, including Time, Parent Folder, Document, Separation Corrections, Reclassifications, Fields Changed, Keystrokes, Document Processing Time, and Changed.

No Touch Details for Document Decision

Time	Parent Folder	Document	Separation Corrections	Reclas...	Fields Changed	Keystrokes	Document Processing Time	Changed
05/01/2018 08:34:57.000 PM	Default Folder Type	1: Document Decision (4)	1	Yes	0	0	0.00:00:06.226	No
05/01/2018 08:31:01.000 PM	Default Folder Type	1: Document Decision (2)	0	Yes	0	0	0.00:00:00.000	No
05/01/2018 08:27:59.000 PM	Default Folder Type	1: Document Decision (2)	0	Yes	0	0	0.00:00:00.000	No
05/01/2018 08:15:56.000 PM	Default Folder Type	1: Document Decision (4)	0	Yes	0	0	0.00:00:00.000	No

To further drill down the data, in the No Touch Details for <Document Type> window, click a row to display the Document Overview, which includes the information grouped under the General, Capture Activities, Capture Events, Field Changes and Field Values tabs.

Classification

Use the Classification submenu to access views related to different document types, processing confidence, and reclassified documents.

This view shows how well the system classifies completed documents by comparing the total number of classified documents by document type and confidence versus reclassifications by resources who perform an attended activity. The Classification view displays data only for completed documents; data related to deleted, timed out, or documents in progress is excluded.

This submenu includes the following views:

- Classification Statistics
- Classification Chart
- Classification Benchmark
- Page Classification Details

You can filter the data by Category, Classification Group, Extraction Group and Document Type.

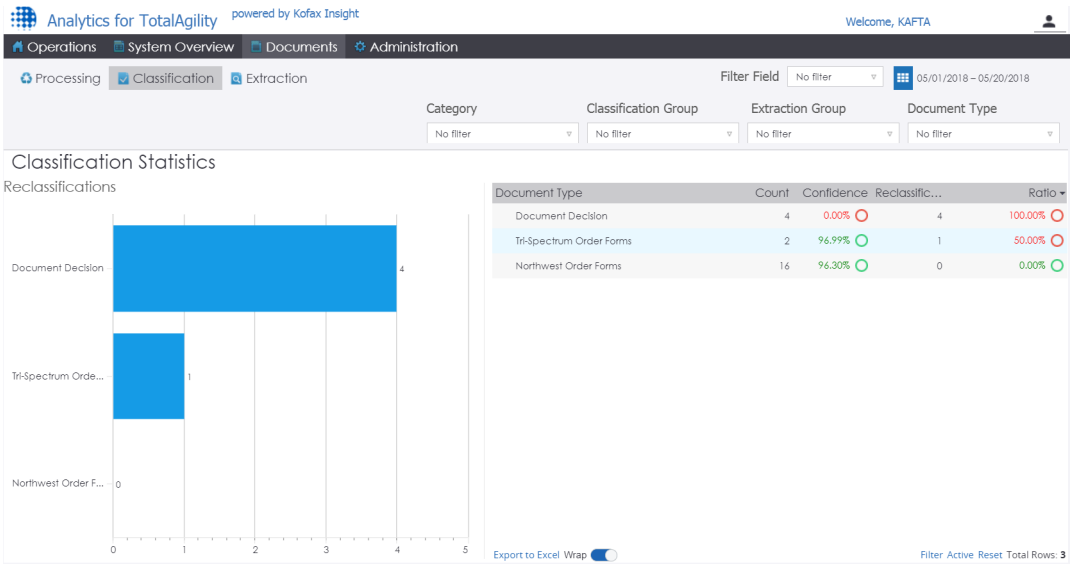
Classification Statistics

Use the Classification Statistics view to review the change ratio for documents, including the count, confidence and the number of reclassifications.

This view displays a horizontal bar chart with reclassified documents for the final document types and the textual chart with final document types (documents that complete capture activities in TotalAgility) after the next hourly execution plan runs.

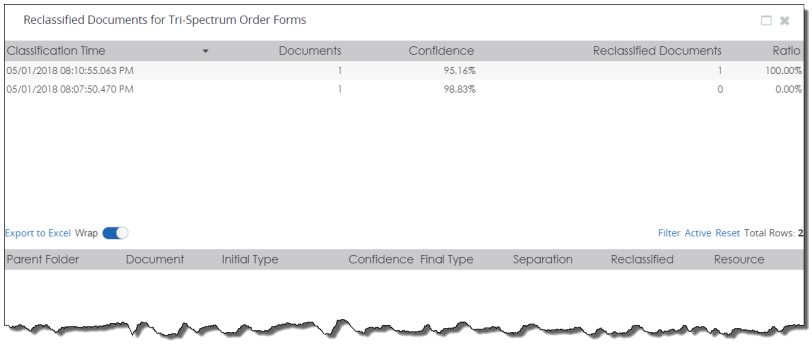
You can filter the data by Category, Classification Group, Extraction Group, and Document Type.

To view the classification statistics, navigate to **Documents** > **Classification** > **Statistics**.

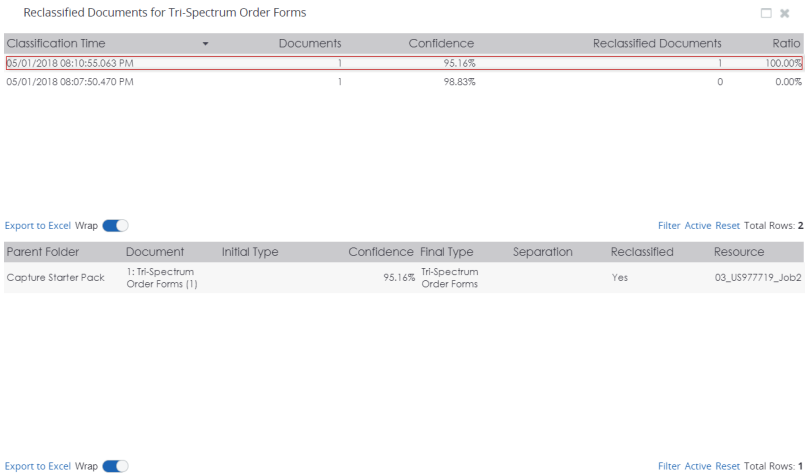


If you modify the date filter, the data in the classification view is updated based on the capture completion date. Click the bar chart to drill down the data by initial document type and the resource who reclassified the document.

When you click a row in the textual chart grid, the Reclassified Documents for <Document Type> appears in a separate window. This window has two grids. The top grid displays the following details related to reclassified documents for the selected document type: Classification time, Documents, Confidence, Reclassified Documents and Ratio.



Click a row in the top grid to view the following details in the bottom grid for the selected reclassified document: Parent Folder, Document, Initial Type, Confidence, Final Type, Separation, Reclassification and Resource.



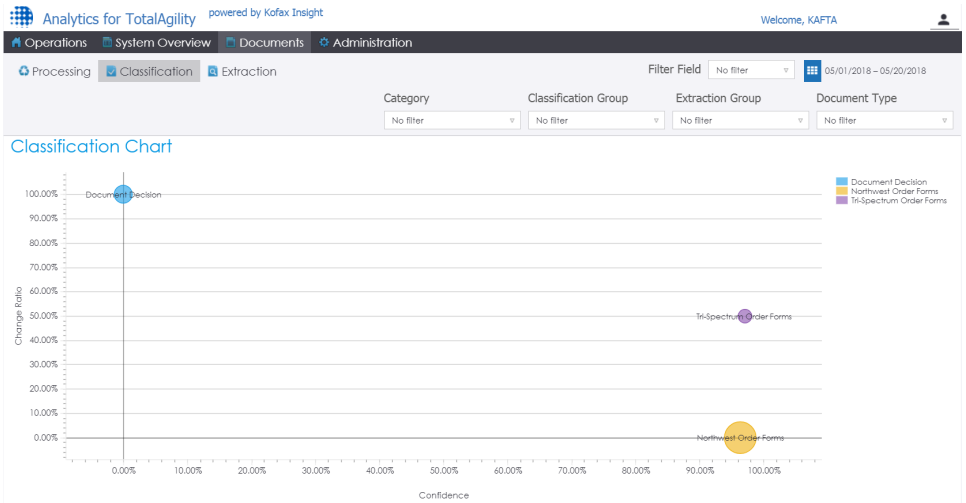
When you click a row in the bottom grid, the Document Overview lists information grouped under the following tabs: General, Capture Activities, Capture Events, Field Changes and Field Values.

Classification Chart

Use the Classification Chart view to analyze the change ratio and confidence for a document type.

This view displays a bubble chart with classification confidence and change ratio (in manual activities) relative to the number of documents processed (size of the bubble) for each document type. The document types in this view represent the final document types.

To view the classification chart, navigate to **Documents** > **Classification** > **Chart**.



When you click a document type in the legend, the chart is dynamically updated with the selected document type being excluded from the chart, and the selected document type is grayed out from the legend.

Click a document type (bubble) on the chart to further drill down the data by initial document type and resource.

Classification Benchmark

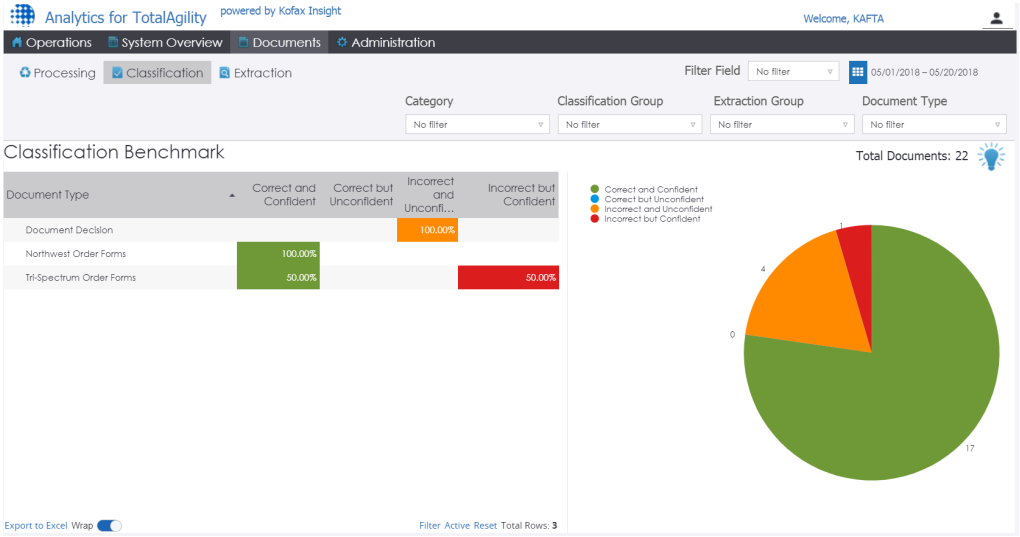
Use the Classification Benchmark view to examine overall classification accuracy based on document types.

Based on this view, you can determine how many document types were accurately classified by the system, along with the number of document types that required corrections in manual activities performed by the operator.

To view the classification benchmark for document types, navigate to **Documents** > **Classification** > **Benchmark**.

This view displays the textual chart with classification accuracy broken down by document type and expressed as a percentage, and displayed as a pie chart. If you click a document type in the classification statistics grid, the pie chart is refreshed to show the classification details for the selected document type.

The total number of documents represented in the view are displayed above the pie chart.



Accuracy	Description
Correct and Confident (Green)	The document is correct and confidently classified by the TotalAgility system, and is completed without any changes or corrections.
Correct but Unconfident (Blue)	The document is correct yet not classified confidently by the TotalAgility system, and is completed without any changes or corrections.
Incorrect and Unconfident (Orange)	The document is incorrect and is not classified confidently by the TotalAgility system, and later reclassified by a resource in a manual activity.
Incorrect and Confident (Red)	The document is incorrect yet classified confidently by the TotalAgility system, and later reclassified by a resource in a manual activity.

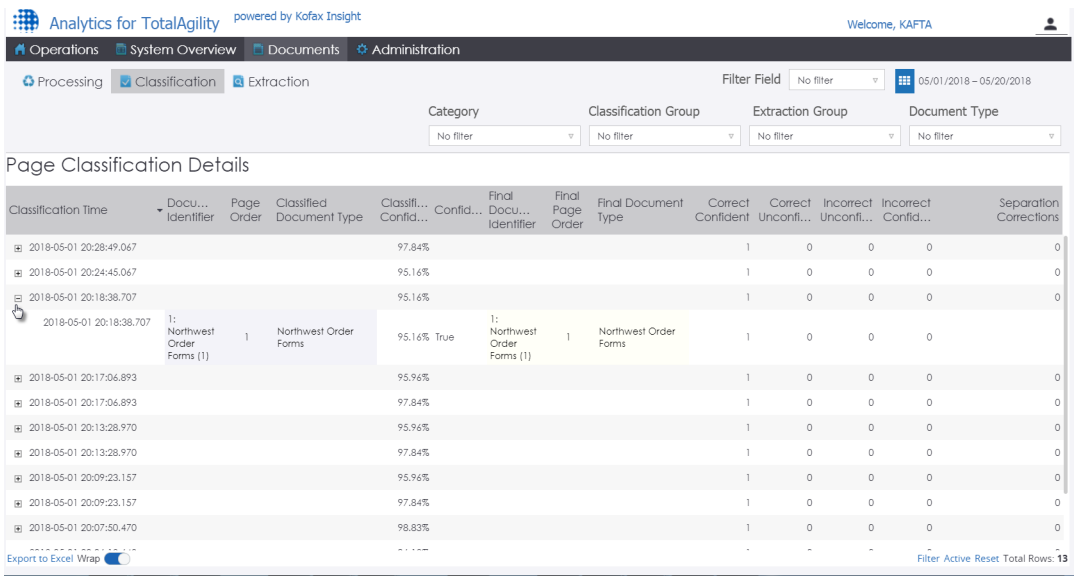
When you click a document type in the Classification Benchmark grid, the pie chart is updated with details about the selected document type. Click a segment on the pie chart to drill down the data by category, document type, initial document type, and resource.

Note Click to display the Classification Benchmark Help pop-up that explains the four combinations for document types represented in the Classification Benchmark view.

Page Classification Details

Use the Page Classification Details view to see the page level details for classification for a better understanding of how TotalAgility system classifies and separates the documents.

To view the Page Classification Details for document types, navigate to **Documents** > **Classification** > **Page Classification Details**.



For every document classified and completed in TotalAgility, this view displays the following page level details:

- Grouped by classification activity completion date/time
- Ordered by classification activity date, document order, and page order
- Classified document type
- Classification confidence (%)
- Confident (Boolean)
- Final document type
- Count of correct confident, correct unconfident, incorrect unconfident, incorrect confident,
- Separation Correction: Split / merge/ page moved

When documents complete classification and export, the Page Classification Details view groups the documents in the record grid by the date/time when the classification activity is completed.

If you modify the date filter, the data in the Page Classification Details view is updated based on the capture completion date.

In the Page Classification Details grid, you can expand the grouped row to view separate rows for each page in the document. When you click a row, the Document Overview pop-up appears that include information grouped under the following tabs: General, Capture Activities, Capture Events, Field Changes and Field Values.

Extraction

Use the Extraction submenu to access views that detail how well the system extracts data from the documents completed in TotalAgility. The graphical view displays the extraction performed in TotalAgility and helps in identifying and making improvements to the process map/extraction group. When you change the date range on the Kofax Analytics for TotalAgility dashboard, the Extraction view reflects the data based on the capture completion date.

This submenu includes the following views:

- Extraction Statistics
- Extraction Chart
- Extraction Benchmark

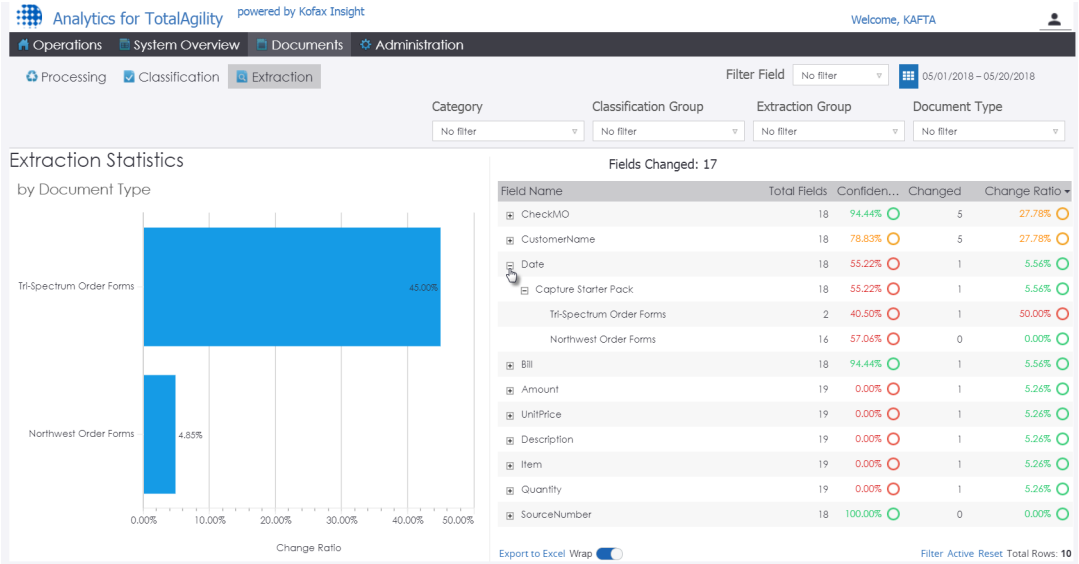
You can filter the data by Category, Classification Group, Extraction Group and Document Type.

Extraction Statistics

The Extraction Statistics view displays a list of all fields for the selected document type. When the fields are extracted in TotalAgility, the extracted fields are listed as columns in the Extraction Statistics metric grid. When viewing the change ratio bar chart, the labels reflect the individual document type.

You can filter the data by Category, Classification Group, Extraction Group and Document Type.

To view the extraction statistics, navigate to **Documents** > **Extraction** > **Statistics**.



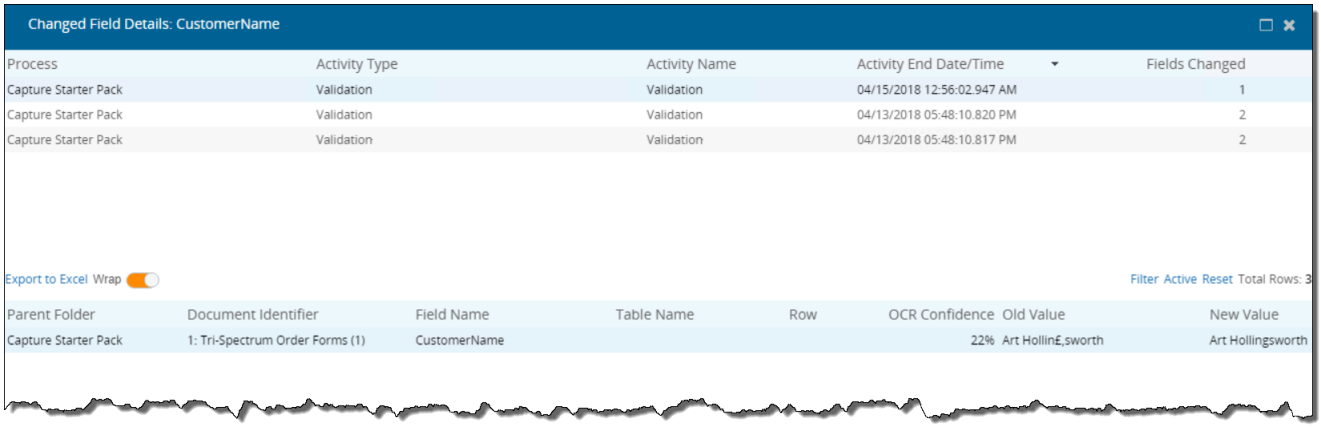
When you click a document type in the bar chart, the system displays the count of field changes and field statistics, including the change ratio for field level data associated with the selected document type. You can expand the field name in the metrics grid to view the associated extraction group and document type.

Refer to the following table for the field statistics.

Field Statistics Column	Description
Field Name	Name of the field.
Total Fields	Count of all fields with the given name in all exported documents, based on the currently selected filters, including date, batch class, site, and document type.
Confidence	Average field extraction confidence value in all exported documents, based on the currently selected filters, including date, batch class, site, and document type.
Changed	Count of all the fields with the given name that are changed manually in all exported documents, based on the currently selected filters, including date, batch class, site, and document type.
Change Ratio	Ratio of the Changed Column to the Total Fields column.

When you click a field name in the Fields Changed grid, the Changed Field Details: <Field Name> window displays the details for the selected field so that you can validate the summarized data. For example, if you click the CustomerName row in the grid, the Changed Field Details: CustomerName window displays the details for the changed fields.

The window has two grids. The top grid displays a list of activities containing documents that had field changes. The details include process, activity type, activity name, activity end date/time and fields changed.



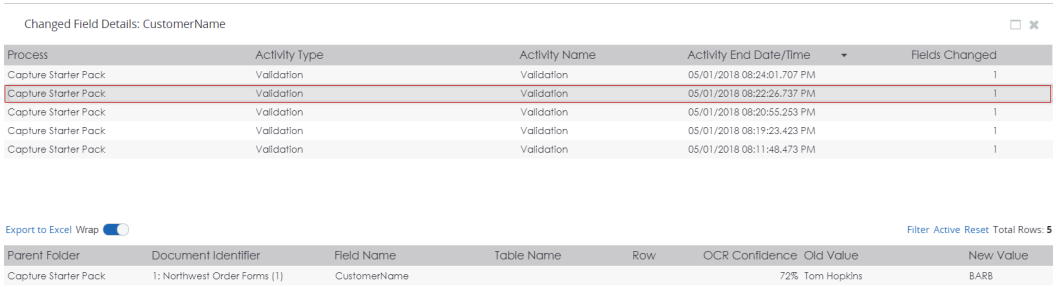
Changed Field Details: CustomerName

Process	Activity Type	Activity Name	Activity End Date/Time	Fields Changed
Capture Starter Pack	Validation	Validation	04/15/2018 12:56:02.947 AM	1
Capture Starter Pack	Validation	Validation	04/13/2018 05:48:10.820 PM	2
Capture Starter Pack	Validation	Validation	04/13/2018 05:48:10.817 PM	2

Export to Excel Wrap Filter Active Reset Total Rows: 3

Parent Folder	Document Identifier	Field Name	Table Name	Row	OCR Confidence	Old Value	New Value
Capture Starter Pack	1: Tri-Spectrum Order Forms (1)	CustomerName			22%	Art Hollin£,sworth	Art Hollingsworth

When you click an activity, the bottom grid populates all changes made to that field for the selected activity. The details include parent folder, document identifier, field name, table name, row, OCR confidence, old value and new value.



Changed Field Details: CustomerName

Process	Activity Type	Activity Name	Activity End Date/Time	Fields Changed
Capture Starter Pack	Validation	Validation	05/01/2018 08:24:01.707 PM	1
Capture Starter Pack	Validation	Validation	05/01/2018 08:22:26.737 PM	1
Capture Starter Pack	Validation	Validation	05/01/2018 08:20:55.253 PM	1
Capture Starter Pack	Validation	Validation	05/01/2018 08:19:23.423 PM	1
Capture Starter Pack	Validation	Validation	05/01/2018 08:11:48.473 PM	1

Export to Excel Wrap Filter Active Reset Total Rows: 5

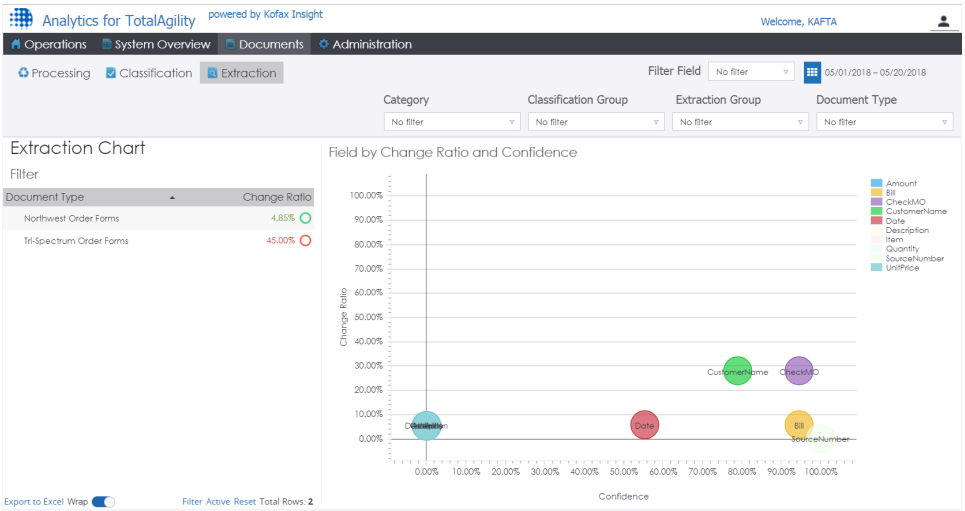
Parent Folder	Document Identifier	Field Name	Table Name	Row	OCR Confidence	Old Value	New Value
Capture Starter Pack	1: Northwest Order Forms (1)	CustomerName			72%	Tom Hopkins	BARB

When you click a row in the bottom grid, the Document Overview window lists the information grouped under the following tabs: General, Capture Activities, Capture Events, Field Changes and Field Values.

Extraction Chart

The Extraction Chart view displays a textual chart that lists document types and a change ratio, and a bubble chart with the percentage of fields changed for each document type.

To view the change ratio of document types, navigate to **Documents** > **Extraction** > **Chart**.



- The Y-axis shows the change ratio
- The X-axis shows the field confidence
- The bubble size shows the number of fields changed

Use the date filter to view the data on the dashboard based on the capture completion date.

When you select a document type in the Extraction Chart grid, the bubble chart is updated based on the OCR confidence and change ratio for the selected document type.

Extraction Benchmark

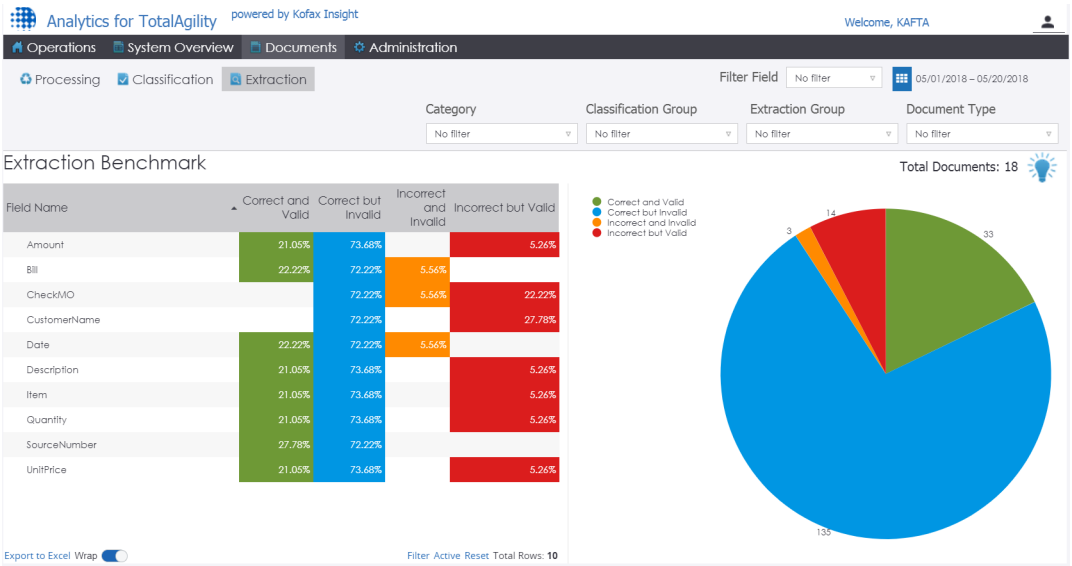
The Extraction Benchmark view helps to understand how well TotalAgility extracts the data while factoring the user experience, which can include making corrections or confirming invalid fields in manual activities.

To view the extraction benchmark, navigate to **Documents** > **Extraction** > **Benchmark**.

This view displays the textual chart with field names and a pie chart with details about the selected field name.

The following colors represent whether a field is valid or invalid:

- **Green**: When an extracted field is valid in TotalAgility, and completed without any changes or corrections, the field name is reflected in the Extraction Benchmark view as Correct and Valid.
- **Blue**: When an extracted field is invalid in TotalAgility and completed without any changes or corrections, the field name is reflected in the Extraction Benchmark view as Correct but Invalid.
- **Orange**: When an extracted field is invalid in TotalAgility and changed in a manual activity, the field name is reflected in the Extraction Benchmark view as Incorrect and Invalid.
- **Red**: When an extracted field is Valid in TotalAgility and changed in a manual activity, the field name is reflected in the Extraction Benchmark view as Incorrect but Valid.



When you click a field name in the Extraction Benchmark grid, the pie chart is updated with details about the selected field. Click a segment on the pie chart to drill down the data by document type and the resource who reclassified the document.

Note Click to display an explanation of the four color combinations for field names represented in the Extraction Benchmark view.

Administration

The Administration menu includes the following views:

- Data Retention
- Filter Field

Data Retention

Use the Data Retention view to define a retention policy for the field records. This helps to manage storage requirements and improve performance over time without compromising the data integrity.

To specify the retention period for records, navigate to **Administration** > **Data Retention** .

Specify the number of days to retain the records in the "most recent days to retain (minimum is 1)" field and press Enter on the keyboard. When the old field records that are older than X days are deleted, all field records for capture completed documents older than X days are deleted.

Specify the retention policy for records in the "most recent days to retain (minimum is 1)" field and press Enter on the keyboard. This controls the behavior of the Delete Field Data per Retention Policy execution plan. The plan automatically deletes fields older than the specified "From date" only for the fields that are capture complete and past the retention policy. The "To date" is ignored. The field records for live documents are not deleted.

As the number of field data records may increase quickly, you must consult with your database administrator on a regular basis to monitor the size of the [Field Fact] table, and update the "Include in Analytics" settings on each document type in Kofax TotalAgility Designer to only send the fields that are required.

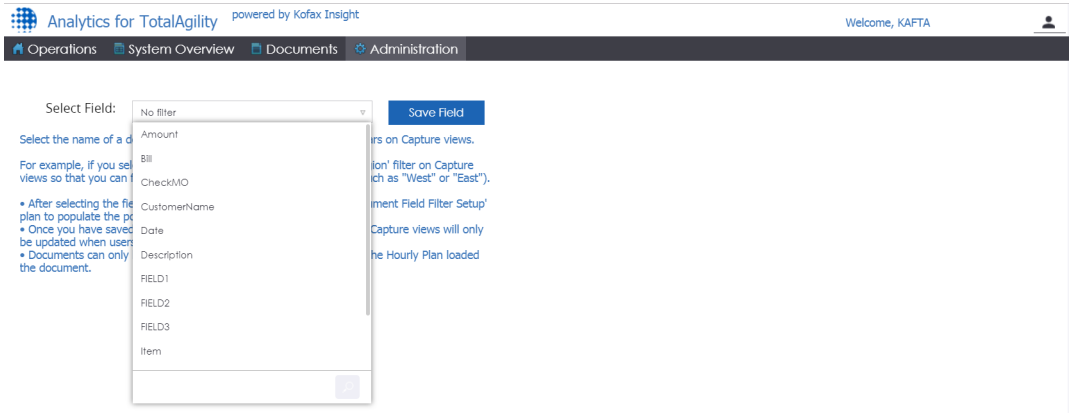
An administrator can delete the old field records manually from the Insight Data Loader.

Filter Field

You can specify a special filter field that can be used for filtering all capture views in Kofax Analytics for TotalAgility. This helps you to analyze capture processing views by field values rather than just field names.

The Filter Fields option is only available if you are a member of the Administrator role. When you specify a filter field, all the completed data for that field will be available in the Kofax Analytics for TotalAgility views as a filter. When you filter the views using the field filter, the views reflect statistics for the documents matching the filtered field.

To specify a filter field, navigate to **Administration** > **Filter Field**.



On the Select Field list, select the field and click Save Field. This will run the Document Field Filter Setup plan to populate the possible values and may take some time to run. Once the plan runs, the filter on the Capture views will only be updated if you refresh the browser. The documents can only be filtered on the field that was set at the time the Hourly Plan loaded the document.

The saved filter field name appears on all the Capture views. The saved filter field can only be applied to the newly loaded data. For example, if you select the field name "Region," there will be a Region filter on Capture view so that you can filter the data based on the specific region.

Chapter 4

Record definitions

This section lists records that are available for use in Kofax Analytics for TotalAgility views.

Activity record

The Activity record 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

Note The Activity 1, Activity 2 and Activity 3 records are temporary utility tables and should not be used as data sources for any custom records/metrics, because their contents are completely refreshed with every hourly data load.

The Activity1 record stores the following fields.

Activity1 Record	Source Column in LIVE_ACTIVITY table
EMBEDDED_PROCESS_COUNT	EMBEDDED_PROCESS_COUNT
NODE_ID	NODE_ID
ACTIVITY_STATUS	For Activity1, the status is set from ACTIVITY_STATUS, and for Activity2 and Activity3, the status is -1.
AUTOMATIC	AUTOMATIC
DUE_DATE	DUE_DATE
COMPLETED_DATE	For Activity1, the value of this record is null, and for Activity2 and Activity3, the value is set from SET_TIME.
EXPECTED_COST	EXPECTED_COST
EXPECTED_DURATION_IN_SECONDS	For Activity1, the expected duration is from the EXPECTED_DURATION_IN_SECONDS column, and for Activity2, it is from the TARGET_TIME_IN_SECONDS column.
NODE_NAME	NODE_NAME
PRIORITY	For Activity1, the priority is from the PRIORITY column, and for Activity2 and Activity3, the value is 1.

Activity1 Record	Source Column in LIVE_ACTIVITY table
PROCESS_NAME	PROCESS_NAME

SLA_STATUS	• For Activity1:
	  • 4 - If the current date time is greater than SLA_STATUS5_DATE
	  • 3 - If the current date time is less than SLA_STATUS5_DATE but greater than SLA_STATUS4_DATE
	  • 2 - If the current date time is less than [LIVE_ACTIVITY].[SLA_STATUS4_DATE], and greater than or equal to [LIVE_ACTIVITY].[SLA_STATUS3_DATE]
	  • 1 - If the current date time is less than [LIVE_ACTIVITY].[SLA_STATUS3_DATE], and greater than or equal to [LIVE_ACTIVITY].[SLA_STATUS2_DATE]
	  • 0 - If the current date time is less than [LIVE_ACTIVITY].[SLA_STATUS2_DATE]
	  • -1 - For all other cases.
	• For Activity2 and Activity3, the value is 0.

TYPE	For Activity1, the type is from the TYPE column, and for Activity2 and Activity3, it is from the ACTIVITY_TYPE column.
VERSION	VERSION
PENDING_TIME	For Activity1, the time is from the PENDING_TIME column, and for Activity2 and Activity3, the time is calculated from the TIME_PENDING_IN_SECS and SET_TIME columns.
PENDING_TIME_IN_SECONDS	For Activity1, the time is calculated from the PENDING_TIME column, and for Activity2, it is calculated from TIME_PENDING_IN_SECS.
TAKEN_TIME	For Activity1, the time is from TAKEN_TIME, and for Activity2 and Activity3, it is NULL.
PROCESS_ID	PROCESS NAME + PROCESS_ID as a string.
JOB_ID	JOB_ID
PERFORMING_RESOURCE_ID	For Activity1, the value is from the PERFORMING_RESOURCE_ID column, and for Activity2 and Activity3, it is from the RESOURCE_ID column.
COST	For Activity1, the value is NULL, and for Activity2 and Activity3, the value is from COST column.
WORKING_TIME_SPENT	For Activity1, the value is NULL, and for Activity2 and Activity3, the value is from WORKING_TIME_SPENT_IN_SECONDS column.
ta_embedded_process_count	EMBEDDED_PROCESS_COUNT
ta_node_id	NODE_ID
LIVE	For Activity1, the value is 1, and for Activity2 and Activity3, the value is 0.
PROCESS_ID_2	PROCESS_ID
DesignTimeType	DESIGN_TIME_TYPE
ServerId	For Activity1 and Activity3, the value is from [SERVER_DATA].SERVER_ID, and for Activity2, the value is NULL.

Activity1 Record	Source Column in LIVE_ACTIVITY table
MACHINE_NAMES	For Activity1 and Activity3, the value is from [MACHINE_NAMES]. MACHINE_NAME, and for Activity2, the value is from MACHINE_NAME .

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

The Activity record stores the following fields.

Activity Record	Source Column in Activity1 table
EMBEDDED_PROCESS_COUNT	EMBEDDED_PROCESS_COUNT
NODE_ID	NODE_ID
ACTIVITY_STATUS	ACTIVITY_STATUS
AUTOMATIC	AUTOMATIC
DUE_DATE	DUE_DATE
COMPLETED_DATE	Calculated from To Date
EXPECTED_COST	EXPECTED_COST
EXPECTED_DURATION_IN_ SECONDS	EXPECTED_DURATION_IN_ SECONDS
NODE_NAME	NODE_NAME
PRIORITY	For Activity1, it is from PRIORITY, and for Activity2 and Activity3, it is 1.
PROCESS_NAME	PROCESS_NAME
SLA_STATUS	SLA_STATUS
TYPE	TYPE

Activity1 Record	Source Column in LIVE_ACTIVITY table
VERSION	VERSION
PENDING_TIME	PENDING_TIME
PENDING_TIME_IN_SECONDS	PENDING_TIME_IN_SECONDS
TAKEN_TIME	TAKEN_TIME
PROCESS_ID	PROCESS_ID
JOB_ID	JOB_ID
PERFORMING_RESOURCE_ID	PERFORMING_RESOURCE_ID
COST	COST
WORKING_TIME_SPENT	WORKING_TIME_SPENT
ta_embedded_process_count	ta_embedded_process_count
ta_node_id	ta_node_id
LIVE	LIVE

Activity1 Record	Source Column in LIVE_ACTIVITY table
PROCESS_ID_2	PROCESS_ID_2
DesignTimeType	DesignTimeType
ServerId	ServerId
MACHINE_NAMES	MACHINE_NAMES
IsCapture	0 if [Design Activity Type Capture].[__ItemId] IS NULL 1 for all other cases.
AUTOMATIC	AUTOMATIC

Job record

The Job record is a combination of the following records:

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

Note The Job 1 and Job 2 records are temporary utility tables and should not be used as data sources for any custom records/metrics, because their contents are completely refreshed with every hourly data load.

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 fields.

Job1 Record	Source Column
COST_OVERRUN	COST_OVERRUN
CREATION_TIME	CREATION_TIME
DURATION_OVERRUN	DURATION_OVERRUN
EXPECTED_COST	EXPECTED_COST
EXPECTED_DURATION_IN_SECONDS	EXPECTED_DURATION_IN_SECONDS
FINISH_TIME	FINISH_TIME
JOB_STATUS	JOB_STATUS
JOB_PERCENT	For Job1, the value is 0. For Job2, the value is from JOB_PERCENT.

Job1 Record	Source Column
PRIORITY	PRIORITY
SLA_STATUS	• 4 - If the current date time is greater than [SLA_STATUS5_DATE] • 3 - If the current date time is less than [SLA_STATUS5_DATE], and greater than [SLA_STATUS4_DATE] • 2 - If the current date time is less than [SLA_STATUS4_DATE], and equal to [SLA_STATUS3_DATE] • 1 - If the current date time is less than [SLA_STATUS3_DATE], and is greater than or equal to [SLA_STATUS2_DATE] • 0 - If the current date time is less than [SLA_STATUS2_DATE] • -1 - For all other cases.
START_TIME	START_TIME
LAST_MODIFIED_DATE	LAST_MODIFIED_DATE
TYPE	TYPE
VERSION	VERSION
EXPECTED_FINISH_TIME	EXPECTED_FINISH_TIME
STATE	STATE
WORKING_DURATION_DAYS	For Job1, it is -1, and for Job2, it is from WORKING_DURATION_DAYS.
PROCESS_ID	PROCESS_NAME + PROCESS_ID as a string
CATEGORY_ID	CATEGORY_ID
JOB_ID	JOB_ID
SOURCE	JOB_SOURCE
Creator	CREATOR
Owner	JOB_OWNER_ID
PROCESS_ID_2	PROCESS_ID
PROCESS_NAME	PROCESS_NAME
ServerId	ORIGIN_SERVER_ID
WorkType	WORK_QUEUE_DEFINITION_ID
AssociatedCaseId	ASSOCIATED_CASE_ID
EXCEPTION_RAISED_BY • 0 - None, Normal job • 1 - ServerException • 2 - ProcessException • 3 - Trigger • 4 - Alert • 5 - DocumentSet	RAISED_BY

The Job2 record retrieves similar information.

The Job record stores the following fields.

Job Record	Source Column in Job1 table
COST_OVERRUN	COST_OVERRUN
CREATION_TIME	CREATION_TIME
DURATION_OVERRUN	DURATION_OVERRUN
EXPECTED_COST	EXPECTED_COST
EXPECTED_DURATION_IN_SECONDS	EXPECTED_DURATION_IN_SECONDS
FINISH_TIME	FINISH_TIME
JOB_STATUS	JOB_STATUS
JOB_PERCENT	For Job1, it is 0; for Job2, it is from JOB_PERCENT.
PRIORITY	PRIORITY
SLA_STATUS	[MaxSLA].[SLA] if [SLA_STATUS] > [MaxSLA].[SLA] [SLA_STATUS] for all other cases
START_TIME	START_TIME
LAST_MODIFIED_DATE	LAST_MODIFIED_DATE
TYPE	TYPE
VERSION	VERSION
EXPECTED_FINISH_TIME	EXPECTED_FINISH_TIME
STATE	STATE
WORKING_DURATION_DAYS	WORKING_DURATION_DAYS
PROCESS_ID	PROCESS_ID
CATEGORY_ID	CATEGORY_ID
JOB_ID	JOB_ID
SOURCE	SOURCE
Creator	Creator
Owner	Owner
PROCESS_ID_2	PROCESS_ID_2
PROCESS_NAME	PROCESS_NAME
ServerId	ServerId
WorkType	WorkType
AssociatedCaseId	AssociatedCaseId
EXCEPTION_RAISED_BY	EXCEPTION_RAISED_BY
IsCapture	[BusinessProcess].[IsCapture]
BatchId	This is batch ID
IsValidValue	false

Document record

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

- doc_dim
- doc_accum_fact
- doc_sess_snaphost_fact
- datch_sess_snaphost_fact
- etl_job
- path_dim
- tfs_class_dim

The DocumentBase record stores the following fields.

DocumentBase Record	Source Column
doc_key	Doc_dim.doc_key
doc_class	Doc_dim.doc_class_key
initial_doc_class	Doc_dim.initial_doc_class_key
Changed	The value is 0 if Doc_dim.doc_class_key = Doc_dim.initial_doc_class_key, and 1 for all other cases.
review_datetime	1/1/1900 - If Doc_dim.dt_last_review_datetime is less than 1900, and Doc_dim.dt_last_review_datetime for all other cases.
Reviewed	The value is 1 if Doc_dim.dt_last_review_datetime is greater than Doc_dim.dt_last_class_datetime, and 0 for all other cases.
Validated	The value is 1 if [doc_sess_snapshot_fact].[session_type]&2 = 2, and 0 for all other cases.
Classified	The value is 1 if [doc_sess_snapshot_fact].[session_type]&4 = 4, and 0 for all other cases.
Extracted	The value is 1 if [doc_sess_snapshot_fact].[session_type]& 1 = 1, and 0 for all other cases.
PROCESSED	Doc_dim.is_exported
Id	[Not Available] - If [doc_accum_fact].[page_num] < 0 OR ([Doc_dim].[initial_doc_class_key] < 0 AND [Doc_dim].[initial_tsf_class_key] < 0 AND [Doc_dim].[doc_class_key] < 0 AND [Doc_dim].[group_value_key] < 0 AND [Doc_dim].[tsf_class_key] < 0). In all other cases, it is calculated by [Doc_dim].[in_sub_folder_position], [Doc_dim].[display_name], and [doc_accum_fact].[page_num].
display_name	[Doc_dim].[display_name]
is_sys_classified	[Doc_dim].[is_sys_classified]
doc_id	[Doc_dim].[doc_id]
in_root_fold_pos_sys_clsf	[Doc_dim].[in_root_fold_pos_sys_clsf]
in_sub_folder_position	[Doc_dim].[in_sub_folder_position]

DocumentBase Record	Source Column
in_root_folder_position	[Doc_dim].[in_root_folder_position]
is_attended_session	1 - If [batch_sess_snapshot_fact].[is_attended_sess] = 1 0 - For all other cases
id_no_page_num	[Not Available] If [doc_accum_fact].[page_num] < 0 OR ([Doc_dim].[initial_doc_class_key] < 0 AND [Doc_dim].[initial_tsf_class_key] < 0 AND [Doc_dim].[doc_class_key] < 0 AND [Doc_dim].[group_value_key] < 0 AND [Doc_dim].[tsf_class_key] < 0) Otherwise, it is calculated by [Doc_dim].[in_root_fold_pos_sys_clsf], and [Doc_dim].[display_name]
Batch_key	Doc_accum_fact.Batch_key
Confident	Doc_accum_fact.is_confly_classified
time_spent_in_classification	[doc_accum_fact].[ms_in_class]
Classified_datetime	Doc_dim.dt_last_class_datetime
page_num	[doc_accum_fact].[page_num]
key_strok_num	[doc_accum_fact].[key_strok_num]
field_num	[doc_accum_fact].[field_num]
class_confidence_perc	[doc_accum_fact].[class_confidence_perc]
doc_sess_duration_ms	[doc_sess_snapshot_fact].[doc_sess_duration_ms] if [batch_sess_snapshot_fact].[is_attended_sess] = 1 0 - For all other cases
all_doc_sess_duration_ms	[doc_sess_snapshot_fact].[doc_sess_duration_ms]
dt_last_proc_datetime	[etl_job].[etl_end_time]
ta_document_group_name	[tsf_class_dim].[ta_document_group_name]
ta_document_type_id	[tsf_class_dim].[ta_document_type_id]
path_closest_subfolder	[path_dim].[path_closest_subfolder]
full_path_wo_closest	[path_dim].[full_path_wo_closest]

The Document record stores the following fields.

Document Record	Source Column in DocumentBase table
doc_key	doc_key
doc_class	doc_class
initial_doc_class	initial_doc_class
Changed	Changed
review_datetime	review_datetime
Batch_key	Batch_key
Confident	Confident
time_spent_in_classification	time_spent_in_classification

Document Record	Source Column in DocumentBase table
confidence_percentage	class_confidence_perc / 100
Reviewed	Reviewed
Validated	Validated
Classified	Classified
extracted	extracted
PROCESSED	PROCESSED
dt_last_proc_datetime	dt_last_proc_datetime
ta_document_group_name	ta_document_group_name
Id	Id
path_closest_subfolder	path_closest_subfolder
display_name	display_name
full_path_wo_closest	full_path_wo_closest
page_num	page_num
doc_sess_duration_ms	doc_sess_duration_ms
is_sys_classified	The value is 0 if [Document Classified Last].[doc_key] IS NULL, and 1 for all other cases.
doc_id	doc_id
in_root_fold_pos_sys_clsf	in_root_fold_pos_sys_clsf
in_sub_folder_position	in_sub_folder_position
in_root_folder_position	in_root_folder_position
key_strok_num	key_strok_num
is_attended_session	is_attended_session
field_num	field_num
all_doc_sess_duration_ms	all_doc_sess_duration_ms
id_no_page_num	id_no_page_num
field_value	[Field Fact].[field_value]
classified_datetime	[Document Classified Last].[full_date_time]
classification_group_name	'Not Set' if [Document Classified Last].[classification_group_name = NULL. [Document Classified Last].[classification_group_name for all other cases.
CATEGORY_ID	[Document Classified Last].[CATEGORY_ID]
is_confly_classified	[Document Classified Last].[is_confly_classified]
Initial Class	[Document Classified Last].[curr_tsf_class]
Class	[DocumentClass].[Class]

Document Record	Source Column in DocumentBase table
BatchId	This is batch ID
IsValidValue	false

Field Fact record

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

- field_accum_fact
- field_dim
- field_column_dim
- etl_job is missing

The Field Fact record stores the following fields.

Field Fact Record	Source Column
Confidence	NULL if [field_accum_fact].[field_column_key] <> - 1 Field_accum_fact.field_confidence_perc / 100 for all other cases
doc_key	Field_accum_fact.doc_key
field_name	- 1 * [field_accum_fact].[field_column_key]if [field_accum_fact].[field_column_key] <> - 1 [field_accum_fact].[field_key] for all other cases.
field_value	Field_accum_fact.field_value
original_value	Field_accum_fact.original_value
recognized_length	Field_accum_fact.chars_recognized_num
field_tbl_index	[field_accum_fact].[field_tbl_index]
Table Name	[field_accum_fact].[field_key] if [field_accum_fact].[field_column_key] <> - 1 0 for all other cases
extr_batch_sess_key	[field_accum_fact].[extr_batch_sess_key]
extr_manual_sess_key	[field_accum_fact].[extr_manual_sess_key]
field_recog_status_key	[field_accum_fact].[field_recog_status_key]
etl_end_time	Calculated by [etl_job].[etl_end_time] + (the current date time - the current UTC date time)

Resource Group record

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

- AW_RESOURCE

- GROUP_MEMBERS

The Resource Group record stores the following fields.

Resource Group Record	Source Column
Group_01	AW_RESOURCE.RESOURCE_ID if AW_RESOURCE.RESOURCE_TYPE==3 GROUP_MEMBERS.GROUP_RESOURCE_ID for all other cases
Resource	AW_RESOURCE.RESOURCE_ID
ServerId	AW_RESOURCE.SERVER_ID

Queue record

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

- LIVE_ACTIVITY
- LIVE_ACTIVITY_RESOURCE
- JOB
- CASE_INSTANCE
- SERVER_DATA

The Queue record stores the following fields.

Queue Record	Source Column
JOB_ID	LIVE_ACTIVITY_RESOURCE.JOB_ID
PROCESS	JOB.PROCESS_ID
Category_01	JOB.CATEGORY_ID
Job Priority	JOB.[PRIORITY]
WorkType	JOB. WORK_QUEUE_DEFINITION_ID
Creation_Time	JOB.[CREATION_TIME]
Complete Date	Calculated from To Date
VERSION	JOB.[VERSION]
JOB_SLA_STATUS	• 4 - If the current date time is greater than JOB.[SLA_STATUS5_DATE] • 3 - If the current date time is less than or equal to JOB.[SLA_STATUS5_DATE] and greater than JOB.[SLA_STATUS4_DATE] • 2 - if the current date time is less than or equal to JOB.[SLA_STATUS4_DATE] and greater than JOB.[SLA_STATUS3_DATE] • 1 - If the current date time is less than or equal to JOB.[SLA_STATUS3_DATE] and greater than JOB.[SLA_STATUS2_DATE] • 0 - If the current date time is less than or equal to JOB.[SLA_STATUS2_DATE] • -1 - For all other cases

Queue Record	Source Column
CASE_REFERENCE	Calculated by SQL function: COALESCE(CASE_INSTANCE.[CASE_REFERENCE], CASE_INSTANCE.[CASE_REFERENCE]) JOB.JOB_OWNER_ID
STATE	JOB.[STATE]
Creator	JOB.Creator
EMBEDDED_PROCESS_COUNT1	JOB.[EMBEDDED_PROCESS_COUNT]
JOB_STATUS	JOB.[JOB_STATUS]
JOB_SOURCE	JOB.[JOB_SOURCE]
PROCESS_ID_2	JOB.PROCESS_ID
PRIORITY	JOB.[PRIORITY]
NODE_ID	LIVE_ACTIVITY_RESOURCE.NODE_ID
EMBEDDED_PROCESS_COUNT	LIVE_ACTIVITY.EMBEDDED_PROCESS_COUNT
ACTIVITY_SLA_STATUS	• 4 - If the current date time is greater than LIVE_ACTIVITY.[SLA_STATUS5_DATE] • 3 - if the current date time is less than or equal to LIVE_ACTIVITY.[SLA_STATUS5_DATE] and greater than LIVE_ACTIVITY.[SLA_STATUS4_DATE] • 2 - If the current date time is less than or equal to LIVE_ACTIVITY.[SLA_STATUS4_DATE] and greater than LIVE_ACTIVITY.[SLA_STATUS3_DATE] • 1 - If the current date time is less than or equal to LIVE_ACTIVITY.[SLA_STATUS3_DATE] and greater than LIVE_ACTIVITY.[SLA_STATUS2_DATE] • 0 - If GETDATE() is less than or equal to LIVE_ACTIVITY.[SLA_STATUS2_DATE] • -1 - If LIVE_ACTIVITY.[AUTOMATIC] <> 0 for all other cases
ACTIVITY_STATUS	LIVE_ACTIVITY.ACTIVITY_STATUS
PENDING_TIME	LIVE_ACTIVITY.PENDING_TIME
NODE_NAME	LIVE_ACTIVITY. NODE_NAME
DesignTimeType	LIVE_ACTIVITY.[DESIGN_TIME_TYPE]
AUTOMATIC	LIVE_ACTIVITY.[AUTOMATIC]
DUE_DATE	JOB.[LAST_MODIFIED_DATE], if LIVE_ACTIVITY.[DUE_DATE] IS NULL LIVE_ACTIVITY.[DUE_DATE] for all other cases
PENDING_TIME_IN_SECONDS	LIVE_ACTIVITY.[PENDING_TIME]
DOCUMENT_COUNT	LIVE_ACTIVITY.[DOCUMENT_COUNT]
PAGE_COUNT	LIVE_ACTIVITY.[PAGE_COUNT]
ACTIVITY_PRIORITY	LIVE_ACTIVITY.[PRIORITY]
USE_ADV_WORKFLOW_RULES	LIVE_ACTIVITY.[USE_ADV_WORKFLOW_RULES]

Queue Record	Source Column
RESOURCE	JOB.PERFORMING_RESOURCE_ID
SLA_STATUS	2 if the current date time is greater than LIVE_ACTIVITY.[SLA_STATUS3_DATE] -1 for all other cases
ServerId	SERVER_DATA.SERVER_ID

Field Accuracy record

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

- Field_accum_fact
- Doc_dim
- etl_job

The Field Accuracy record stores the following fields.

Field Accuracy Record	Source Column
Class	[doc_dim].[doc_class_key]
Conf_chars	SUM(field_accum_fact.conf_chars_num)
Field_01	- 1 * [field_accum_fact].[field_column_key] if [field_accum_fact].[field_column_key] <> - 1 [field_accum_fact].[field_key] for all other cases
Field_num	field_accum_fact.Count(*)
fields_changed	SUM of fields where [field_accum_fact].[field_recog_status_key] = 2**OR** [field_accum_fact].[field_recog_status_key] = 4
total_chars	SUM(Field_accum_fact.chars_recognized_num)
validated_chars	SUM(Field_accum_fact.chars_validated_num)
dt_last_valid	Calculated by [field_accum_fact].[dt_last_valid] + (the current date time - the current UTC date time)
etl_end_time	Calculated by [etl_job].[etl_end_time]+ (the current date time - the current UTC date time)

Session record

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

- batch_sess_snapshot_fact
- etl_job
- station.dim

The Session record stores the following fields.

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	[batch_sess_snapshot_fact].[dt_end_datetime] + (the current date time – the current UTC date time)
!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 = 1
!key_strok_num	batch_sess_snapshot_fact.key_strok_num
!missed_split_points_num	batch_sess_snapshot_fact.missed_split_points_num
!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
!wrong_split_points_num	batch_sess_snapshot_fact.wrong_split_points_num
!station name	station_dim.station_name
!Etl_end_time	[etl_job].[etl_end_time] + (the current date time - the current UTC date time)
!batch_sess_snapshot_key	[batch_sess_snapshot_fact].[batch_sess_snapshot_key]
mod_key	[batch_sess_snapshot_fact].[mod_key]