

Kofax Analytics for TotalAgility

Release Notes

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Chapter 1

About this release

The release notes contain information about potential issues you could encounter while using Kofax Analytics for TotalAgility. Please read this document carefully before you install or use this product, as it may contain information not included in other Kofax Analytics for TotalAgility documentation.

Version information

This Kofax Analytics for TotalAgility product is identified by build number 1.4.0.0.0.505, which is listed in the About window on the Kofax Analytics for TotalAgility dashboard.

Product documentation

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

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

Offline documentation

To access the documentation offline (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*.

Chapter 2

New features

This section describes the new features and enhancements included in Kofax Analytics for TotalAgility 1.4.0.

Dashboard views

The following dashboard views are enhanced or newly added:

- **Operations:** This dashboard is enhanced to include the following new views: Activity SLA and Job SLA, Breakdowns and Pending Time.
- **System Overview:** This dashboard includes views related to jobs, breakdown of completed jobs, all escalations raised within a specified period of time and trending information of the documents processed in TotalAgility.
- **Documents:** This dashboard includes views related to processing, classification and extraction of data.

The new Documents views are only populated after:

- The data is generated after successful installation of Kofax TotalAgility 7.5, or later.
- That data is successfully loaded by the Kofax Analytics for TotalAgility 1.4.0 Hourly Plan.

The preceding requirements apply to the following new views:

- Deleted Documents and Pages
- Rejections
- Resource Productivity
- Document Processing Time
- No Touch Processing
- Classification Statistics
- Classification Chart
- Classification Benchmark
- Extraction Statistics
- Extraction Chart
- Extraction Benchmark

The Separations, Reclassifications, Fields Changed and Keystrokes columns in the Resource Productivity and Document Processing Time views will be empty for data generated by earlier versions of Kofax TotalAgility.

The No Touch Processing, Classification (Statistics, Chart, and Benchmark), and Extraction (Statistics, Chart, and Benchmark) views only include the documents that have been marked

Capture Complete in Kofax TotalAgility 7.5.0. To mark a document as Capture Complete, configure a Delete or Export process activity to Mark Completed in Kofax TotalAgility Designer, or call the CaptureDocumentService.UpdateDocumentsProcessingCompleted API.

Filters

The global filters and page filters are available to manage the data that displays on the dashboard. Each dashboard view 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.

Export to Excel

A new option, Export to Excel, is available on a grid where you can select preferences that affect the content and format when exporting the grid to Microsoft Excel.

Grid footers

Some charts and grids include additional features such as Export to Excel, text wrap settings, filters and reset, in the footer. Footers may also include chart or grid-specific data such as total number of rows.

User menu items

On the title bar of the application, the following user menu items are available:

- Language: To display the dashboard in another language.
- Bookmarks: To bookmark frequently used views, add as favorite and set the bookmark visibility with public, personal or to selected roles.
- About: To view the version and build number for Kofax Analytics for TotalAgility that is installed.
- Logout: To log out of the application.

Chapter 3

Changes in behavior

This chapter describes changes to the product behavior since the previous release.

Navigation links to TotalAgility

You can no longer configure the navigation links from "Kofax Analytics for TotalAgility" to "TotalAgility" from the dashboard views.

Changes to the dashboard data

In Kofax Analytics for TotalAgility 1.4.0, the dashboards display data for all activity types. In the previous releases, the dashboards displayed data only for capture activities.

The Classification and Extraction views are moved to the newly added dashboard called *Documents*.

The Jobs and Resources views under Administration dashboard are moved to the newly added dashboard called *System Overview*.

The Classification activity type is renamed as Separation Classification.

Backward compatibility – records and metrics

To maintain backward compatibility, the records and metrics available in Kofax Analytics for TotalAgility 1.3.0 continue to work after upgrading to Kofax Analytics for TotalAgility 1.4.0 so that your custom views and alerts are not affected.

Note If a deprecated record or metric is used by a custom view, you must update the Hourly Plan to include the Load Deprecated Data step.

We recommend that you stop using deprecated items as they may be removed in future release. All deprecated records and metrics are named with a leading underscore, which can be used as an indicator of items to remove.

The following metrics are deprecated as of Kofax Analytics for TotalAgility 1.4.0.

Accuracy Changed Field Count	Document Class Fields Change Ratio
Accuracy Character Count	Document Classification Average Confidence

Accuracy Conf. Character Count	Document Classification Change Count
Accuracy Field Count	Document Classification Change Ratio
Accuracy Validated Character Count	Document Review Average Confidence
Accuracy Validated Field Count	Document Review Change Count
Activity Completed Count	Document Review Change Ratio
Activity Completed Review Average Time	Document Review Count
Activity Completed Review Total Time	Job Session Finished Count
Activity Due Count	Productivity Activity Count
Activity Due Max Pending Time	Productivity Avg Time Per Activity
Document Class Field Change Ratio	Productivity Avg Time Per Process
Document Class Field Changes	Productivity Documents Completed
Document Class Field Confidence	Productivity Job Count
Document Class Field Total Number	Productivity Time Spent

Backward compatibility - deprecated views

The following views are deprecated in Kofax Analytics for TotalAgility 1.4.0. However, the deprecated views are available at the bottom on the dashboard menus in Kofax Analytics for TotalAgility 1.4.0 suffixed with KAFTA 1.3. For example, Classification Changes (KAFTA 1.3).

Dashboard	Deprecated views
Documents > Processing	<ul style="list-style-type: none"> • Review by Resource • Review by Process • Resource Productivity • Deleted pages
Documents > Classification	<ul style="list-style-type: none"> • Classification Changes • Classification vs. Review • Misclassified and Reclassified
Documents > Extraction	<ul style="list-style-type: none"> • Field Changes • Field Analysis • Field Accuracy

Note

- The Filter Field, Classification Group, Extraction Group and Document Type filters do not apply to any deprecated views.
- If the Mask Field Values option is configured for a field in TotalAgility, the masked field values will have fixed values for the following:
 - "Recognized Length" under Extraction > Field Changes (KAFTA 1.3) > Field Details pop-up > Document Details pop-up
 - "Total Chars", "Confident Chars" and "Validated Chars" under Extraction > Field Accuracy (KAFTA 1.3)

You can enable access to the deprecated views by adding view rights to the Kofax Analytics for TotalAgility roles in Insight Admin Console. See the following steps.

1. Log in to **Admin Console**.
2. Open roles in the left navigation pane.
3. Click the applicable role.
4. Click the **View rights** tab in the role screen.
5. Click the **KAFTA** project in the list.
6. Clear (if selected) and select again the "Views" node in the project object tree.
7. Click the `_deprecated` node.
8. Check the deprecated views you wish to add to the Kofax Analytics for TotalAgility menus.

Changed records

The following records are changed in Kofax Analytics for TotalAgility 1.4.0.

Record	Changes
Activity record	<ul style="list-style-type: none"> • "Automatic" is changed from numeric to string, such as "Manual Activity". • "PROCESS_ID" includes the process GUID. • The Activity 1, Activity 2 and Activity 3 records are temporary utility tables and are no longer used as data sources for any custom records/metrics since their contents are completely refreshed on every hourly data load.
Activity Resource Pending record	This record can be assigned to multiple resources. Previously, this record had one row per activity per assigned resource.
Classification vs Review record	"Confidence" column is changed from integer to float.
Document record	<ul style="list-style-type: none"> • "Changed" column is True or False; previously, it was 0 or 1. • "PROCESSED" column is True or False; previously, it was 0 or 1. • "Confidence_Percentage" column is changed from integer to float. • "UN_TOUCHED" field is removed.

Record	Changes
Field Accuracy record	This record has one row per field. Previously, rows were grouped.
Field Fact record	<ul style="list-style-type: none"> "Confidence" column is changed from integer to float. "dt_last_valid" is replaced by "etl_end_time". "doc_class" is replaced by "doc_class" from joined Document record. "is_changed" and "fields_changed" fields are replaced by the following expression: "[field_recog_status_key] = 2 OR [field_recog_status_key] = 4" "field_num" is replaced by 1.
Job record	"PROCESS_ID" now includes a process GUID.
Queue record	This record no longer has the "RESOURCE_ID" or "STATUS" columns, and has only one record per activity instead of additional records for each resource assigned to the activity. Additionally, the processes that do not have the "Include in PI" flag are now excluded.

Note For the columns that changed from integer to float, you must change the column formatting to "Percent, no decimal" on the view component in Insight Studio. Then run Upgrade_Data_Fix.sql to correct the values. See the Upgrade chapter of the *Kofax Analytics For TotalAgility Administrator's Guide* for more information.

Changed metrics

The following metrics are changed in Kofax Analytics for TotalAgility 1.4.0.

Metric	Changes
Document Classification Average Confidence	The value includes two decimal places.
Document Classification Change Ratio	The value includes two decimal places.
Document Review Average Confidence	The value may be different due to rounding.
Job Session Created Count	This metric is renamed as Breakdowns Historical Jobs and now only includes data for the completed jobs. To get data for live jobs, use the Breakdowns Live Jobs metric.
Activity Pending All Seconds	<ul style="list-style-type: none"> This metric is formatted as a time interval, which was previously displayed as an integer value. This metric includes completed activities. Previously, it included all activities, both current and historical.

On upgrading to Kofax Analytics for TotalAgility 1.4.0, the following metrics now have rows for both capture and non-capture activities.

- Activity Completed Cost
- Activity Completed Cost Exclude TotalAgility
- Activity Completed Cost per Hour
- Activity Completed Time

- Activity Completed Time Exclude TotalAgility
- Activity Pending All Seconds
- Activity Pending Completed Count
- Activity Target Time

Removed metrics

The following metrics are removed in Kofax Analytics for TotalAgility 1.4.0.

- _Document No Touch Count
- _Document No Touch Ratio
- Document Class Field Characters Validated Length

Chapter 4

Resolved issues

This section describes the previously reported issues that are resolved in Kofax Analytics for TotalAgility 1.4.0.

Extraction view grid displayed incorrect data

When two different document types had a field with the same name, and if a particular document type was selected, the parent view displayed the results filtered for the selected document type only. Further drill down of data on the selected document type displayed the results for all fields with the same name from all document types. (1102497)

Reporting results for All Live Jobs were incorrect

If a process used sub-jobs in TotalAgility, the reporting results for All Live Jobs were incorrect. (1097268)

Incomplete translation for Administrator Resources view

When German language was used, the translation for Administrator Resources dashboard view was incomplete. (1059317)

Inaccurate document count

The document count displayed on the Overview dashboard was incorrect as the documents that were deleted, or merged to another document were still included in the total document count. (973921)

Duplicate entries issue

When a document was moved between different root folders, the fields of the document were duplicated. (973832)

Incorrect data displayed

The data displayed on the All Live Jobs chart was incorrect. (942208)

User mapping issue

For a User Mapping configuration, the SQL Query in the User Identifier section contained incorrect mappings that returned binary data. This had an impact on licensing. (918823)

Silent installation issue

When Kofax Analytics for TotalAgility was installed in silent mode across the network, installation failed and the data load was incomplete. (763941)

Deleted Pages chart did not display data

The hourly execution plan did not pick up any pages that were deleted in the past hour when Insight was installed on a server that did not use UTC time. This resulted in the "Batch Pages Deleted" table being empty, and the "Deleted Pages" view being empty. (754284)

Issue ingesting PDF and TIFF files in TotalAgility

When the PDF and TIFF files were ingested through FileUpload in Kofax TotalAgility, the page and document count in the Overview dashboard in Kofax Analytics for TotalAgility were not updated. (740481)

Issue ingesting PDF and TIFF files in TotalAgility using Kofax Import Connector

When the PDF and TIFF files were ingested into Kofax TotalAgility using Kofax Import Connector, the page and document count in the Overview dashboard in Kofax Analytics for TotalAgility were not updated. (740082)

Deleted pages in Scan Client were not displayed

The pages that were deleted in the Scan Client were not displayed on the Deleted Documents and Pages view in Kofax Analytics for TotalAgility. (345149)

Chapter 5

Known issues

This chapter describes issues that you may encounter while using Kofax Analytics for TotalAgility 1.4.0.

Extra connection issue on upgrade

When upgrading to Insight 6.0, an extra connection with the same name as your project is added under Connections in the Admin Console. This connection is not needed and can be deleted. (1154605)

Information missing on upgrade

On upgrading to Kofax Analytics for TotalAgility 1.4.0, some data (for example, Parent Folder Identifier is missing or Document column displays incorrect Document name) in the Document Search view is missing or incorrectly displayed. This is because the data did not exist for the documents that were processed before installing Kofax TotalAgility 7.5.0. (1154101)

Issue with Scan activity on upgrade

On upgrading to Kofax Analytics for TotalAgility 1.4.0, in the Document Trending view, the Average Documents by Activity Type for Scan may be too low when viewed for dates before Kofax TotalAgility 7.5 was installed. (1153552)

Hourly Data Load plan may fail

The data load for a significantly large backlog of data may cause the Hourly Plan to fail. (1150087)

Workaround: Load the data incrementally in chunks (one date range at a time) during off-peak operating hours.

Deprecated views do not open

When enabled, the deprecated views are visible on the Kofax Analytics for TotalAgility dashboard menus, but they do not open when selected. (1142560)

Workaround: Run `IISReset`.

Login fails after changing the language

When you change the language of the Kofax Analytics for TotalAgility dashboard using the Language option on the title bar of Kofax Analytics for TotalAgility, language changes but the login fails with the following error: "Login failed. User Id is empty." (1132693)

Workaround: Login again to Kofax Analytics for TotalAgility.

Error occurs when launching Insight Viewer

When you click the KAFTA shortcut configured in TotalAgility Workspace navigation for the first time, the following error occurs: "Login failed. User Id is empty." If you click the shortcut for a second time, the Kofax Analytics for TotalAgility view is launched correctly. (1078363)

Workaround:

1. On the server where Insight is launched, open Internet Information Services (IIS) Manager.
2. Navigate to **Sites > Default Web Site > Insight > View > Session State**.
3. Change the Cookie Settings to anything other than Auto Detect. We recommend that you change the Cookie Settings to "Use Cookies."
4. Click **Apply** to save the changes.