Kofax Performance Analytics

Using process chains

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KOFAX

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Preface

About this guide

This document describes the process chains delivered with Performance Analytics and how to use them to load data in the Business Warehouse. All storage objects (DataSources and InfoProviders) are delivered with an accompanying process chain to load data, and these simple chains can be used for functionality tests. For daily data loads in a production environment, the simple chains are bundled into meta chains. The use of meta chains makes the integration into an existing load schedule very easy. Also, as some load processes need to use data from otherwise unrelated objects, the use of meta chains ensures that all loads are triggered in the correct order.

Chapter 1

Chain Order (periodic loading)

While loading the data, two options are available for using the Data Acquisition Layer (DAL). The DAL is the first layer for the storage of the source system data. It is designed to store all the data from the source system in its original form.

Depending on the scenario implemented, only one of the options below must be chosen.

Option 1: Loading the data by storing the data in the Data Acquisition Layer (DAL)

This option is recommended for customers who have enough space in the system and would like to store the original ERP data in BW.

Option 2: Loading the data by skipping the Data Acquisition Layer (DAL)

This option is recommended for customers who do not have enough space in the system or who do not want to store the original ERP data in BW.

Order of loading when using the DAL storage

Solution package	PC technical name	PC description	Remarks
Cross-Application	/EBY/PDALL_DELTA_DAL	Meta chain to load solution-independent transactional data	Must always be the first delta chain and must not be excluded from the loads
AP OCR Statistics	/EBY/APOCRALL_DELTA_DAL	Meta chain to load OCR-specific transactional data	OCR can be used only in combination with the AP solution package
Accounts Payable	/EBY/APALL_DELTA_DAL	Meta chain to load AP-specific transactional data	-
PD Generic Document	/EBY/PDBO_ALL_DELTA_DAL	Meta chain to load generic PD transactional data	-
PD Workflow	/EBY/PDWC_ALL_DELTA_DAL	Meta chain to load WC-specific transactional data	-
Sales Orders	/EBY/PDSO_ALL_DELTA_DAL	Meta chain to load SO-specific transactional data	-

Solution package	PC technical name	PC description	Remarks
Accounts Receivable	/EBY/ARALL_DELTA_DAL	Meta chain to load AR-specific transactional data	-

Order of loading when skipping the DAL storage

Solution package	PC technical name	PC description	Remarks
Cross-Application	/EBY/PDALL_DELTA_NODAL	Meta chain to load solution-independent transactional data	Must always be the first delta chain and must not be excluded from the loads
AP OCR Statistics	/EBY/APOCRALL_DELTA_NODAL	Meta chain to load OCR-specific transactional data	OCR can be used only in combination with the AP solution package
Accounts Payable	/EBY/APALL_DELTA_NODAL	Meta chain to load AP-specific transactional data	-
PD Generic Document	/EBY/PDBO_ALL_DELTA_NODAL	Meta chain to load BO-specific transactional data	-
PD Workflow	/EBY/PDWC_ALL_DELTA_NODAL	Meta chain to load WC-specific transactional data	-
Sales Orders	/EBY/PDSO_ALL_DELTA_NODAL	Meta chain to load SO-specific transactional data	-
Accounts Receivable	/EBY/ARALL_DELTA_NODAL	Meta chain to load AR-specific transactional data	-

Chapter 2

Chain order (first loading)

The following tables list the meta chains grouped by solution packages and in the order in which to start them. If a solution package is not used, its entry can be skipped.

The meta chains for initialization and text loads are listed separately. When loading data for the first time from a source system, the initialization and text chains should be executed before any of the delta chains. The initialization and text chains do not have any order dependency on each other.

Meta chains for initialization loads

Solution package	PC technical name	PC description
AP OCR Statistics	/EBY/APOCRALL_DELTA_INIT	Meta chain to initialize OCR-specific transactional data
Accounts Payable	/EBY/APALL_PSA_DELTA_INIT	Meta chain to initialize AP-specific transactional data
PD Generic Document	/EBY/PDBO_ALL_DELTA_INIT	Meta chain to initialize generic PD transactional data
PD Workflow	/EBY/PDWC_ALL_DELTA_INIT	Meta chain to initialize WC-specific transactional data
Sales Orders	/EBY/PDSO_ALL_DELTA_INIT	Meta chain to initialize SO-specific transactional data

Meta chains for text loads

Solution package	PC technical name	PC description
Cross-Application	/EBY/PDALL_TEXT_LOAD	Meta chain to load solution-independent text
AP OCR Statistics	/EBY/APOCRALL_TEXT_LOAD	Meta chain to load OCR-specific text
Accounts Payable	/EBY/APALL_TEXT_LOAD	Meta chain to load AP-specific text
PD Generic Document	/EBY/PDBO_ALL_TEXT_LOAD	Meta chain to load generic PD text
PD Workflow	/EBY/PDWC_ALL_TEXT_LOAD	Meta chain to load WC-specific text
Sales Orders	/EBY/PDSO_ALL_TEXT_LOAD	Meta chain to load SO-specific text

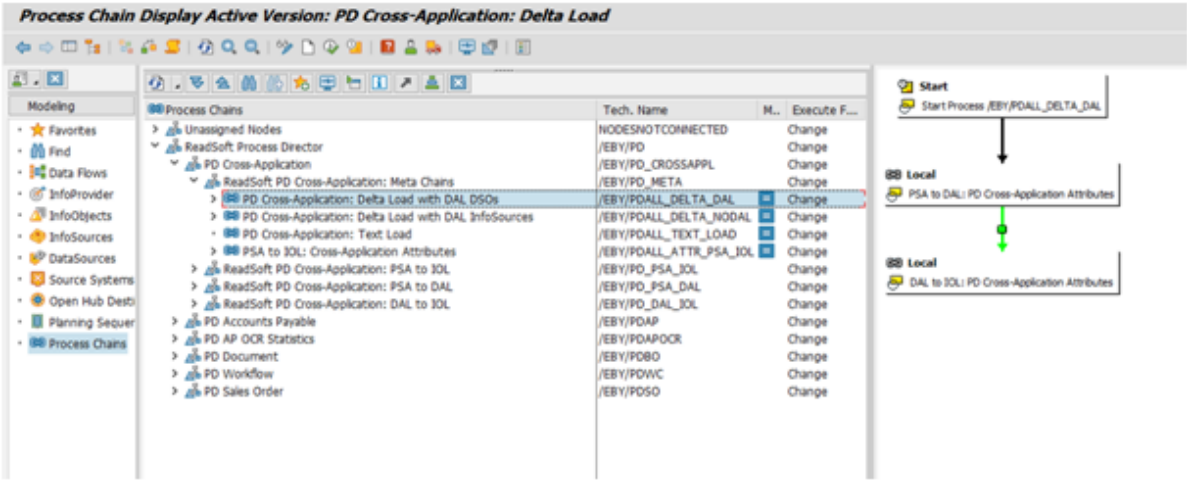
Solution package	PC technical name	PC description
Accounts Receivable	/EBY/ARALL_TEXT	Meta chain to load AR-specific text data

Chapter 3

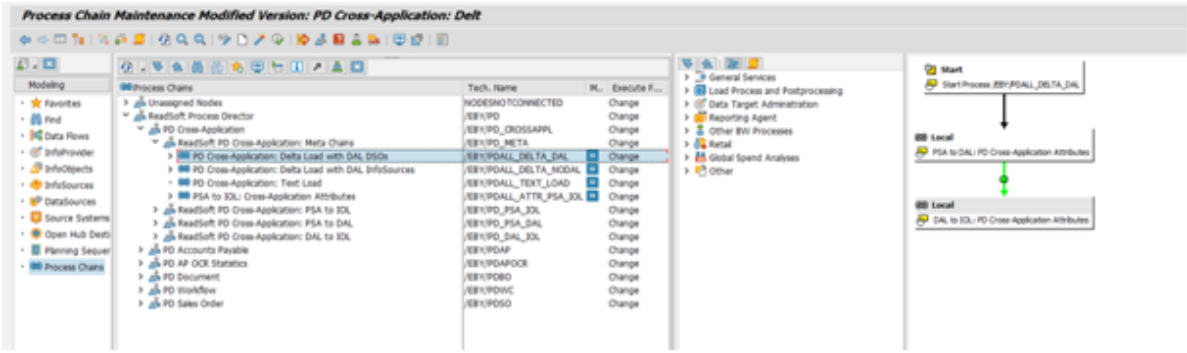
Manually starting the process chains

To manually start the process chains, complete the following steps.

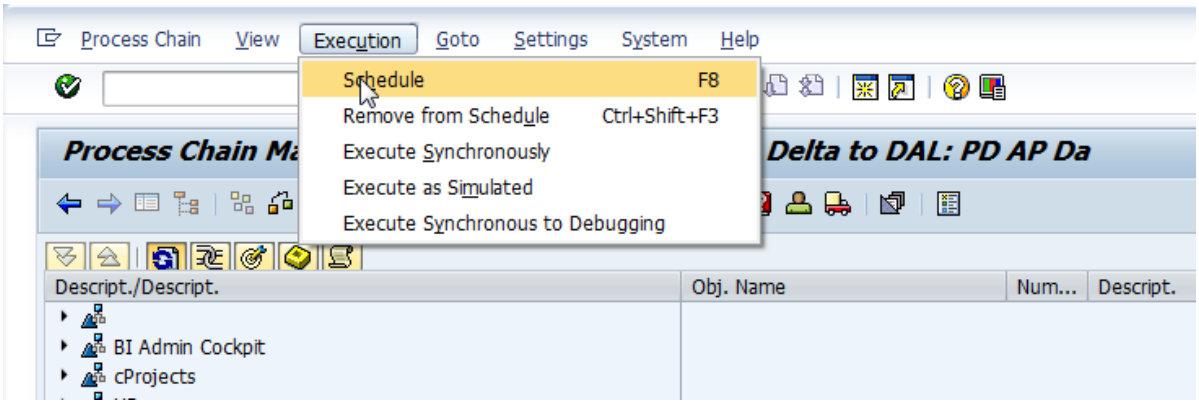
1. Call the `RSPC` transaction.
2. Select the process chain.



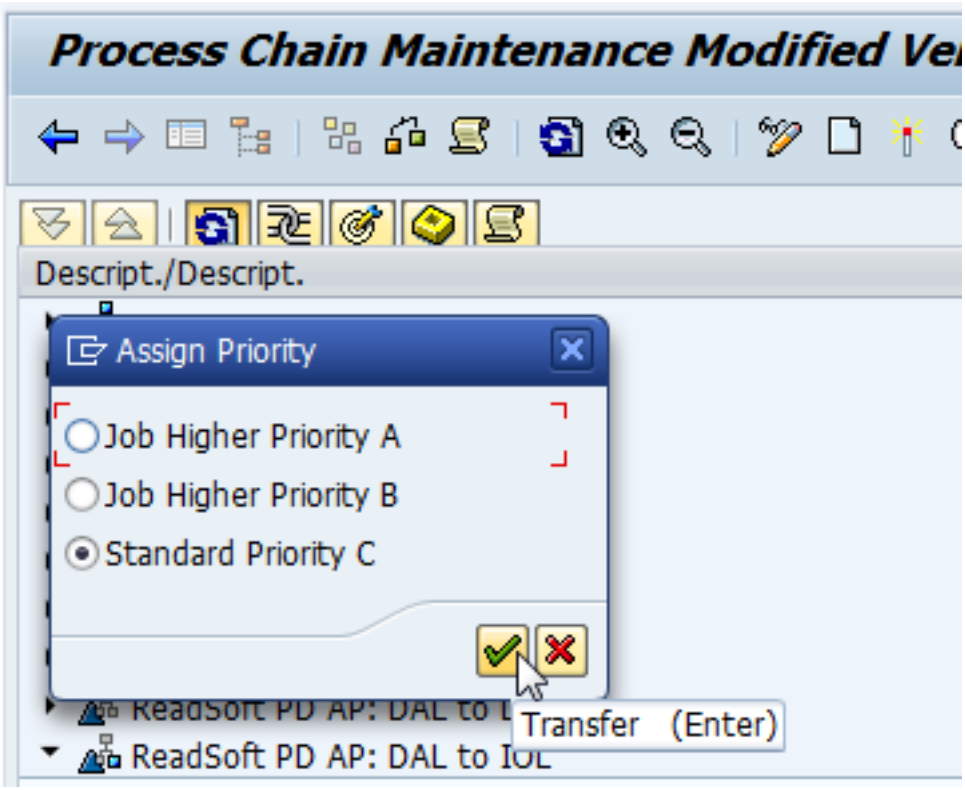
3. Click the **Display/Change** button.



4. Select **Execution** > **Schedule** .

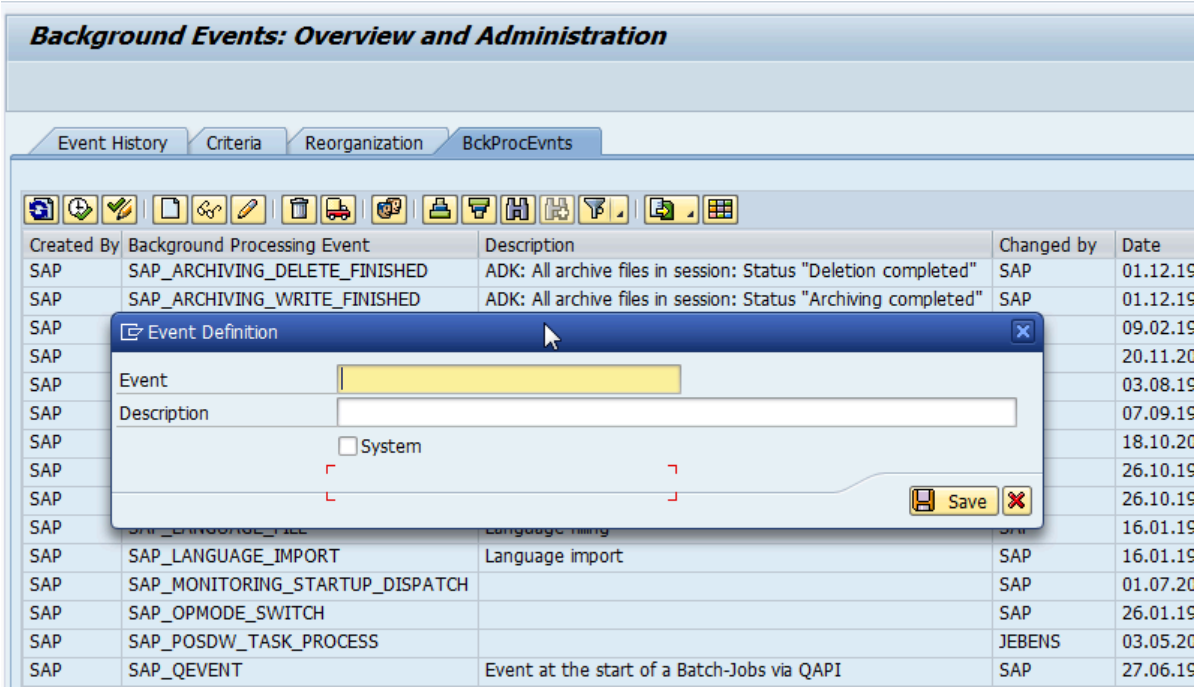


5. Select the **Standard Priority C** option and click the **Transfer** button. The scheduling of the process chain is now done.



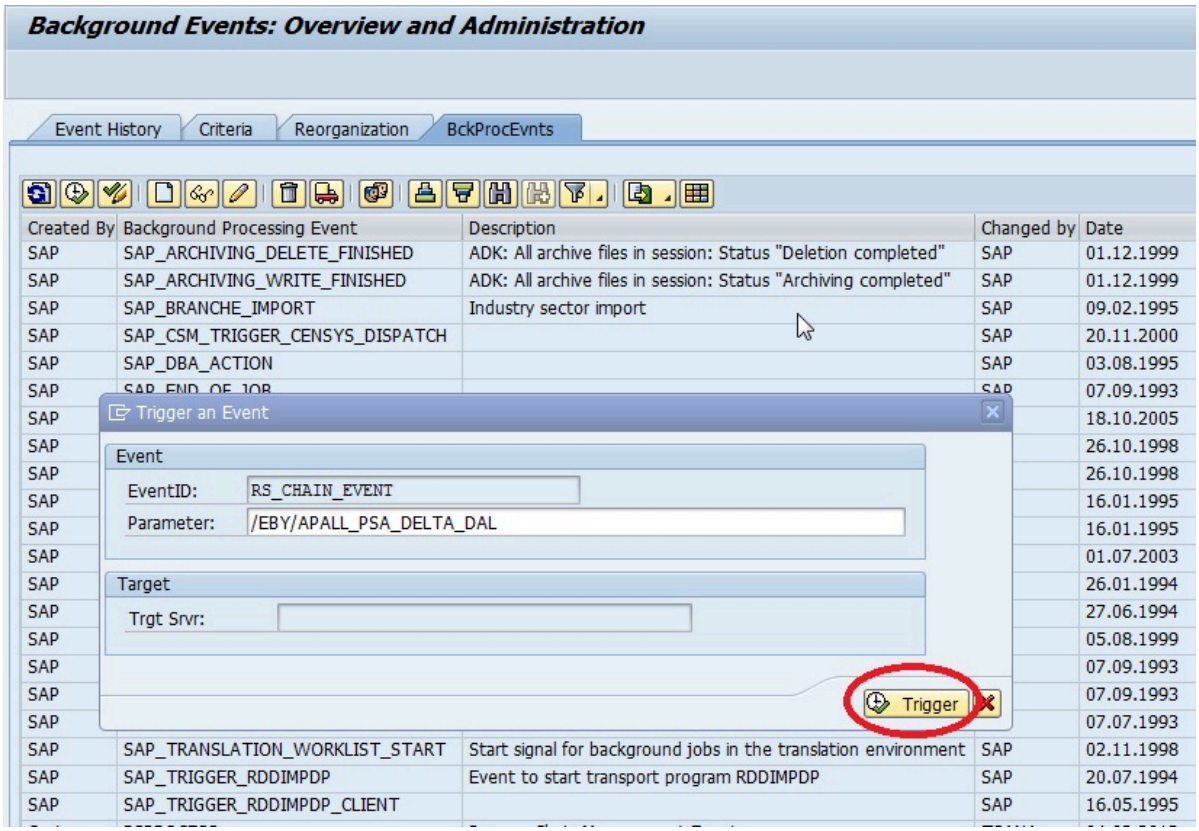
6. Call the `SM64` transaction.

7. Create a new event to start the process chain (skip this step if the `ReadSoft event for process chain starters` already exists).



Example Event: `RS_CHAIN_EVENT`
Description: ReadSoft Event for process chain starters

8. Trigger the process chain, giving the following **Event Parameter**: PC Technical Name



Chapter 4

Scheduling a process chain

To schedule a process chain, complete the following steps.

1. Call the `RSPC` transaction and open the process chain in edit mode.
2. Right-click **START variant and choose Maintain variant**. Now you can maintain the variant.
3. Click **Start condition**.
4. Click **Date/Time**.
5. Enter the **start date** and **start time**.
6. Select the **Periodic** check box for periodicity.
7. Set the periodicity.
8. Save the process chain.
9. Save the main job scheduling screen again.
10. Check and activate the process chain.
11. Change to the display mode.
12. Click the **Schedule** button.