

# Kofax Process Analytics for use with SAP Fiori®

User Guide

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The logo for KOFAX, consisting of the word "KOFAX" in a bold, blue, sans-serif font.

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# SAP Fiori®

SAP Fiori® is a collection of multichannel web applications that are designed to work on both desktop and mobile browsers. This signifies that a single instance of the installed web application can support end users, regardless of the device they are using. SAP Fiori® is available for iOS, Android, and Windows mobile platforms.

**Note** SAP SE sets any limitation that exists in the use of SAP Fiori®.

## Log in

You can use a mobile device or web browser to log in to SAP Fiori® .

To log in using a web browser, complete the following steps.

1. Navigate to the Fiori URL in a web browser.  
The SAP Fiori® login screen appears.
2. Type your user name and password.
3. In the Language list, select a login language.
4. Click Log On.

The SAP Fiori® launchpad appears.

## Change the password

To change the password, complete the following steps.

1. In the login screen, type the current user credentials.
2. Click Change Password.
3. Type the current password.
4. Type the new password twice.
5. Click Change.


**Note** The language and client parameters, as well as the option to change the password, can be customized in standard SAP.

## Use the toolbars

You can use the toolbars to work with the application and process the documents.

### Header toolbar

The header toolbar provides actions that are relevant for the entire screen. It is a fixed header and is always visible. However, the content of the toolbar depends on whether you are in the launchpad or in one of the installed applications. When using the header toolbar, you have the following options.

- To go back to the launchpad when you are in the App Finder or an application, click **Home** .
- To search for a specific application, in the **Search In: Apps** text box, type the name or search term related to the application that you want to search for, then click **Search** .
- To access user-specific options, click the **Options** menu and perform one of the following actions.
  - To view and change the user preferences, click **User Preferences** and complete the steps described in Change the user preferences.
  - To access the launchpad's personalization mode, click **Personalize Home Page** and complete the steps described in Personalize the launchpad.
  - To open the App Finder and search for applications to add to the launchpad, click **Open App Finder**
  - To log out of the application, click **Log Off** 

### Change the user preferences

The User Preferences dialog box displays the user name and email address, the server that the application connects to, and the language selected during login. You cannot change these settings here. However, you can change the theme of the SAP Fiori® client.

To change the theme, complete the following steps.

1. To display the available themes, click **Theme**.
2. In the list of available options, select the theme that you want to apply.
3. Click **Save**.

### Footer toolbar

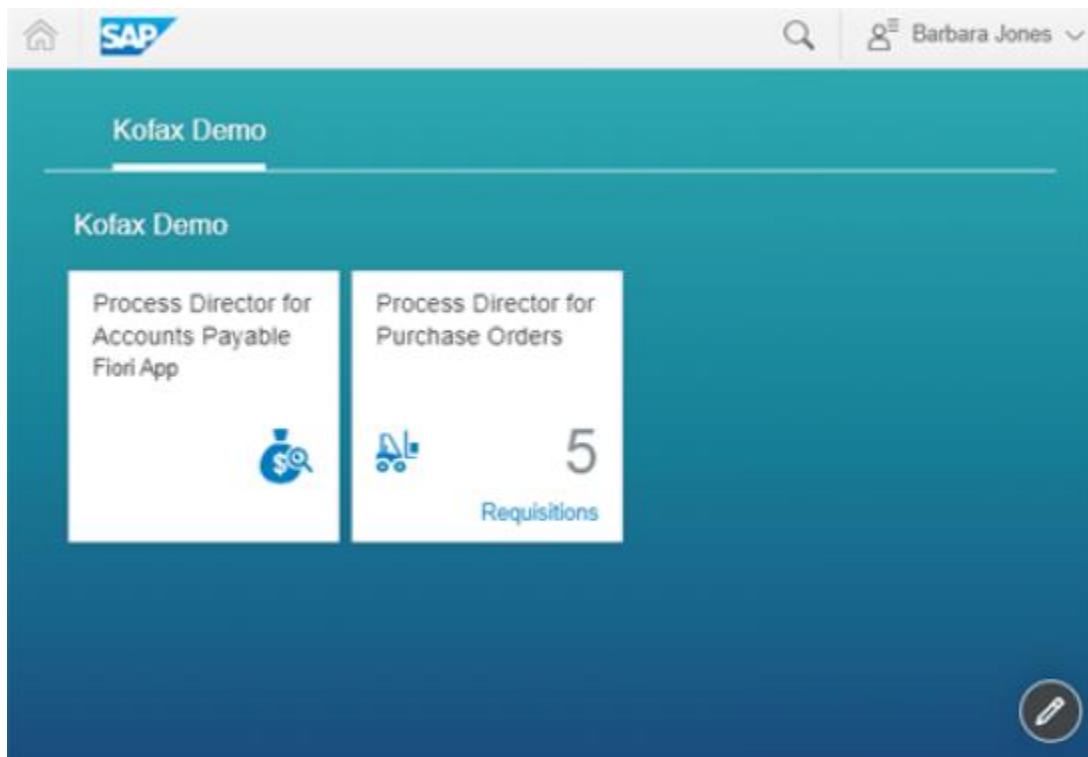
When using the footer toolbar within the application, you have the following options.

- You can sort the documents in the document list.

- You can process the documents in workflow.
- You can click **Save** to save the changes made to a document.

## SAP Fiori® launchpad

The SAP Fiori® launchpad is the SAP standard entry point for all the installed Fiori applications. Each application is represented by its own tile. The tiles are organized in groups. Each group is available on its own tab.



### Use the launchpad

When using the launchpad, you have the following options.

- To open an application, click the corresponding tile.
- To access an application from another group, select the tab of the corresponding group.

## Personalize the launchpad

To personalize the content of the SAP Fiori® launchpad, you have the following options.

- Work with tiles
- Work with groups

See the SAP Fiori® Client User Guide for detailed information.




### Work with tiles

To work with tiles, complete the following steps.

1. At the bottom-right corner of the launchpad, click Personalize Home Page or use the same option in the Options menu.

The personalization mode of the launchpad is activated.

2. Complete the steps that are required for the modification that you want to make.

Action	Steps
Add an application to a tile	<ol style="list-style-type: none"> <li>a. In the group to which you want to add an application, in the empty tile, click <b>Open App Finder</b>  or use the same option in the <a href="#">Options menu</a>.</li> <li>b. Optional. To display applications of a specific catalog only, in the <b>All catalogs</b> list, select the corresponding catalog.</li> <li>c. Optional. To search for an application, in the <b>Search in tile catalog</b> text box, type the name or search term related to the application that you want to add. The applications that match the search term appear.</li> <li>d. Below the tile of the application that you want to add, click <b>Add tile to group</b> . A confirmation message appears and the button changes to a check mark.</li> </ol>
Remove an application or tile	In the group from which you want to remove the application, at the top right of the corresponding tile, click <b>Remove</b>  .

Action	Steps
Move a tile to another group	<ul style="list-style-type: none"> <li><b>a.</b> Select the tile that you want to move.</li> <li><b>b.</b> In the menu that appears, click <b>Move</b>.</li> <li><b>c.</b> In the <b>Move to Group</b> dialog box, select the group to which you want to move the tile.</li> </ul> <p><b>Tip</b> You can also drag a tile directly to another group.</p>
Rename a tile	<ul style="list-style-type: none"> <li><b>a.</b> Select the tile that you want to rename.</li> <li><b>b.</b> In the menu that appears, click <b>Settings</b>.</li> <li><b>c.</b> In the <b>Settings</b> dialog box, type the new title. You can also enter a subtitle and other related information about the application.</li> <li><b>d.</b> Click <b>OK</b>.</li> </ul>

4. To exit the personalization mode, at the bottom-right corner of the launchpad, click **Exit Action Mode** or use **Exit Personalization Mode** in the **Options** menu.

### Work with groups

To work with groups, complete the following steps.

1. At the bottom-right corner of the launchpad, click **Personalize Home Page** or use the same option in the **Options** menu.

The personalization mode of the launchpad is activated.

2. Complete the steps that are required for the modification that you want to make.

Action	Steps
Add a group	<ul style="list-style-type: none"> <li><b>a.</b> In the center of the launchpad, at the position where you want to add the group, click <b>Add Group</b>.</li> <li><b>b.</b> In the new group that appears, type the group name and press Enter.</li> </ul>
Delete a group	Click <b>Delete</b> at the right of the group.
Rename a group	<ul style="list-style-type: none"> <li><b>a.</b> In the group that you want to rename, click the group name.</li> <li><b>b.</b> Type the new name and press Enter.</li> </ul>



Action	Steps
Move a group to another position in the launchpad	<ul style="list-style-type: none"> <li>a. Select the name of the group that you want to move.</li> <li>b. Drag the group to the new position and drop it in the group placeholder.</li> </ul>
Reset the content of a group to its initial setup	Click <b>Reset</b> at the right of the group.

3. To exit the personalization mode, at the bottom-right corner of the launchpad, click Exit Action Mode or use Exit Personalization Mode in the Options menu.

## Working with KPI data

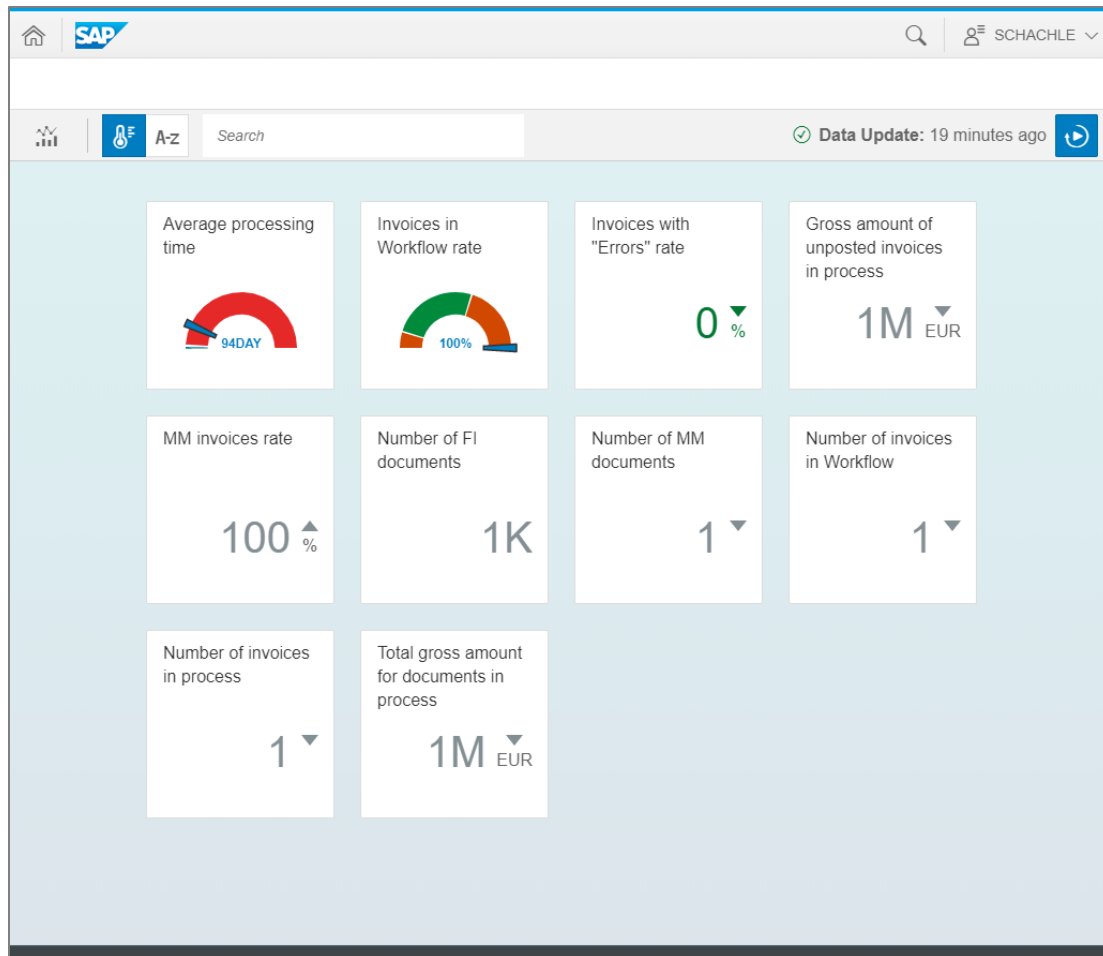
This section explains how to open and navigate the Kofax Process Analytics Fiori Application and how to work with KPIs

### Open the Process Director Fiori Application

To open the application, complete the following step.

- On the SAP Fiori® launchpad, click the **PA Dashboard** application.

The start page appears.



## Navigate the application

### Header and application toolbars

1. Use the header toolbar to navigate, search, access the user preferences, and log out of Fiori.
2. You can directly drill down into the data set without clicking on a KPI tile by using **Analysis Path** icon

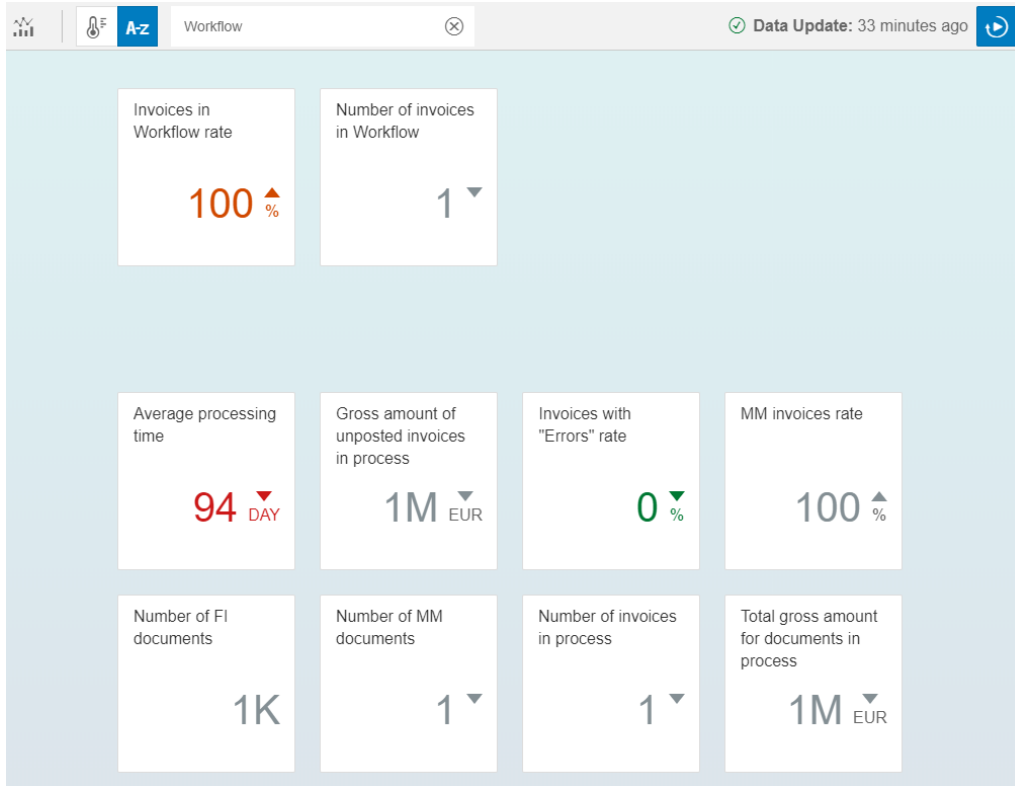


in the the application toolbar


3. You can sort your tiles by severity, or alphabetically by name



4. You can search for specific KPIs by using the **Search box** in the application tool



5. The upper right corner will display the time of the latest data update that is periodically updated in the ERP system that is the source of the data.

6. To the right of the **Data Update** value a control that allows you to turn on, or off, automatic data updates from the ERP system.  If the automatic data updates are turned on, and the processing job executes on the ERP system, the browser will not be usable during the update process and will display a progress indicator until the update is complete.

7. Each configured KPI tile will display

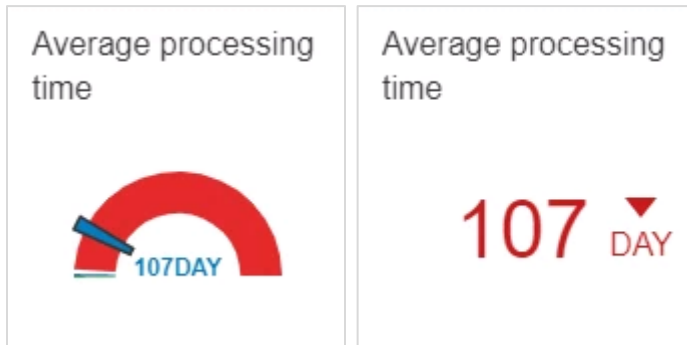
- A text label for the information displayed
- A graphical representation of that information, or, a text representation of the key figure in large font in center of the tile

## Work with KPIs

KPIs offer both a value on their face, as well as the ability to drill down into different dimensions of the initial KPI dashboard value.

### Face value

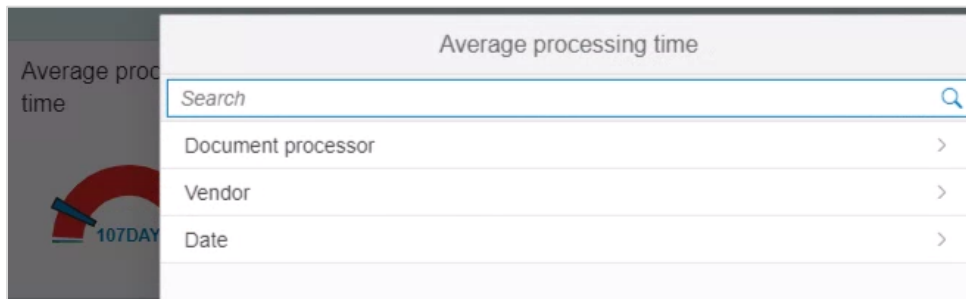
Some KPI tiles may display two different representations of the key metric. For example, the following tile show both a speedometer view as well as digital number alternating every few seconds on the same tile.




### KPI drill down

When you click on a KPI tile, the application will offer additional dimensions by which you can further examine the initial metric.

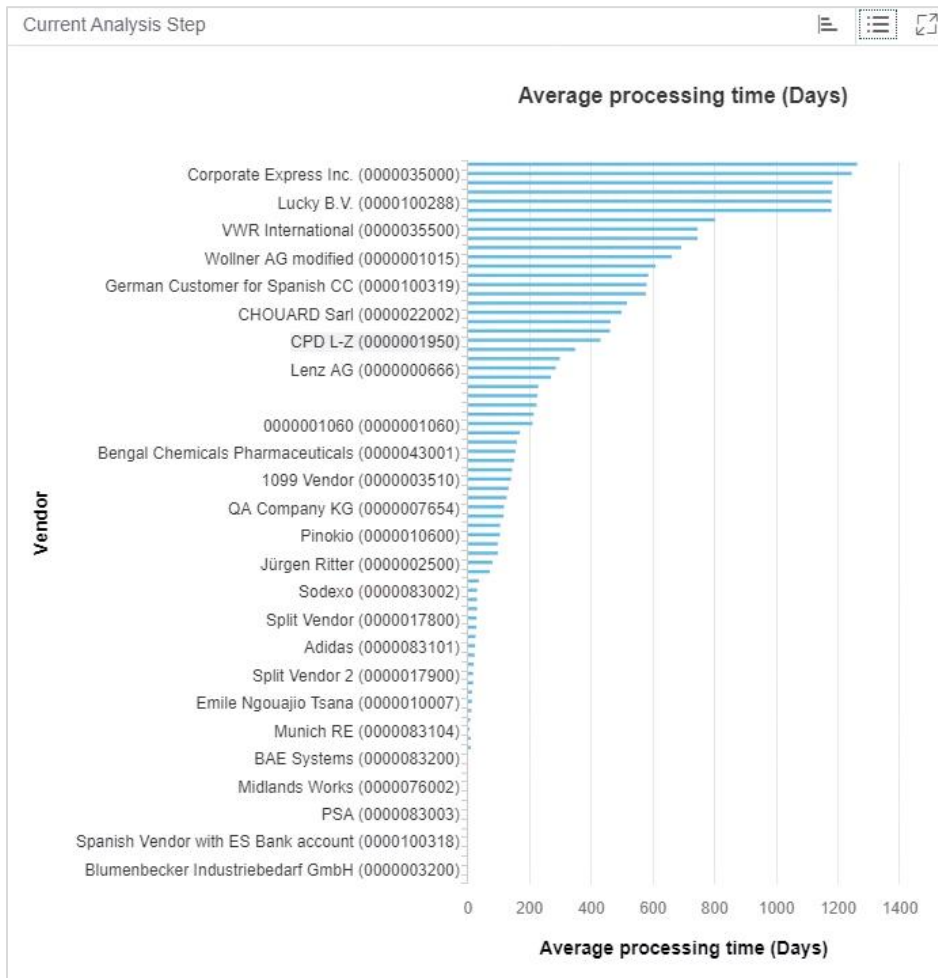
In the following example, you can see that the average processing time KPI can be further explored by three different characteristics.



After selection of the characteristic like Vendor, in the above example, you are presented with a choice of chart representations to select from.




	<b>Pie Chart</b> Sorted by: Average processing time (Days)
	<b>Column Chart</b> Sorted by: Average processing time (Days)
	<b>Bar Chart</b> Sorted by: Average processing time (Days)
	<b>Table Representation</b> Sorted by: Average processing time (Days)

Resulting in a new and expanded chart view of the core KPI metric



### Further graphical controls

Once in a graphical chart view, you can choose additional options from the **Current Analysis Step** toolbar, including the following.

- Change the chart type 
- Hide or show the chart legend 
- Expand chart to use entire browser window 

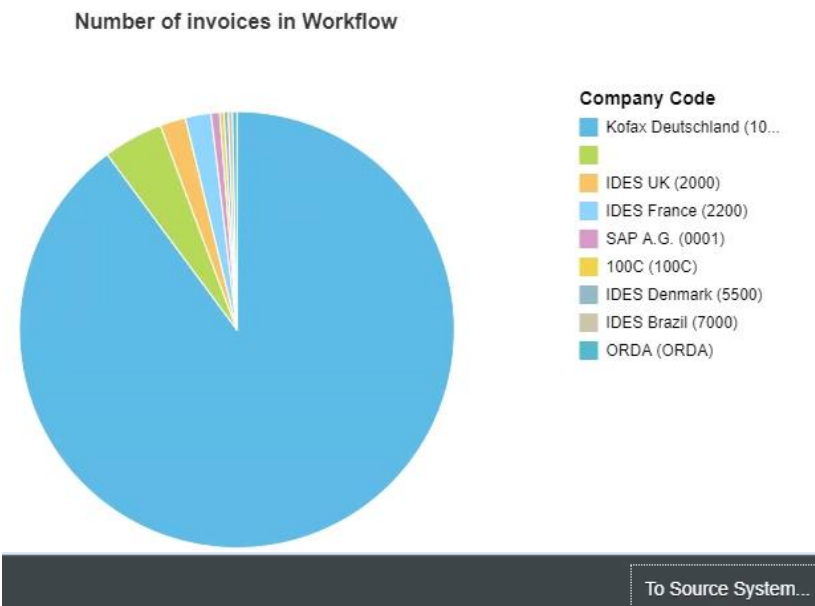
### Jump to source system

Once in a chart view for a KPI, you may be presented with an option titled **To Source System** in the lower right corner of the application window that offers you the choice to navigate to the ERP system where the data actually comes from.

- Initial KPI tile



- Drilldown chart



- Results in the source system

Process Director (315)

Menu ▾  ◀ Back Exit Cancel System ▾ Check Perform Post Park doc. Transfer FI <-> MM Display image

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Status	Workflow	Vendor details	Follow-up	Sent to PD	DocNo	FI / MM	Type	Document Date	Vendor	Purch.Doc.
📄	🔴	Lloyds Banking Group, London			<u>11903</u>	MM	RE	18.10.2019	<u>832...</u>	<u>4108320...</u>
📄	🔴	Linde AG, München			<u>11900</u>	MM	RE	18.10.2019	<u>831...</u>	<u>4108310...</u>
📄	✉️	Adidas, Herzogenaurach			<u>11894</u>	MM	RE	18.10.2019	<u>831...</u>	<u>4108310...</u>
📄	🔴	C.E.B. BERLIN, Berlin			<u>11828</u>	FI	KR	14.10.2019	<u>1000</u>	
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📄	🔴	C.E.B. BERLIN, Berlin			<u>11798</u>	FI	KR	14.10.2019	<u>1000</u>	