KOFAX

KAFC Project Customizations

Applies to: KAFC 1.0, 1.1, 1.2

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Contents

Summary

This article will describe recommendations for users who wish to customize the out-of-the-box KAFC Project.

Overview

Direct customization of the out-of-the-box KAFC Project as delivered by Kofax is not supported or recommended. Altering the KAFC Project will also inhibit your ability to upgrade to a newer version of the KAFC Project when it becomes available.

Licensing Requirements

In order to proceed with the Recommendations outlined below, the user must have purchased KAFC with a Studio license (contractually limited to the existing Kofax Capture and Insight data sources) or have also purchased the separate and full Kofax Insight software license (no limits to which data sources that can be used).

The Insight License Manager (for Insight 4.3.X) or the Insight Admin tool (for Insight 5.X) can be used to evaluate your installed Insight license.

Recommendations

In order to maintain the integrity of the out-of-the-box KAFC Project, the following approach is recommended. Note that this is not a required approach, but merely a recommended one as users are ultimately free to customize in any manner they choose.

Create a New Project

As an initial first step, a separate new and empty Project should be created. This new custom Project will be used to contain all of the desired customizations for your KAFC implementation, including Views, Records, Metrics, etc. Do not import the entire KAFC Project into this new custom Project – leave it empty to start with and then only add custom content.

Keeping all of the customized content completely separate from the non-customized out-of-the-box content will make your overall environment much easier to manage going forward. It will also allow you to upgrade the out-of-the-box KAFC Project should a new version become available in the future.

Export/Import the KAFC Main View

Since most user customizations will revolve around new or modified dashboard Views, the first step would be to export the "Main" View from the out-of-the-box KAFC Project, and import it into the new custom Project.

This will now allow you to customize the Main view in your new custom Project so that you can add new Menu items for new Views, or re-direct existing Menu items to point to any modified Views (which will only exist in the new custom Project).

Point Dashboard Users to the Main View in your Custom Project

Dashboard user Roles can then be configured (in the Insight Admin tool) to point to this new version of the Main view (in your custom Project) as their default view. They will no longer be using the Main view that comes in the out-of-the-box KAFC Project.

Export/Import other Views

To speed development of your new custom Project, you can use the Export/Import tool to copy over any other Views that you wish to modify. You of course can also build new Views from scratch in your custom Project. Do not import any views that you do not intend to modify.

Add the KAFC Project Data DB as a Data Source

Many new or modified views can be built on the existing Records and Metrics in your out-of-the-box KAFC Project. To do this you will first want to add a new Data Source to your custom Project that points to the Data DB of your out-of-the-box KAFC Project. This will expose the various tables that exist there for any Overwrite Records or Pre-aggregated Metrics.

Create On-Demand Objects when Needed

You may often find that you need to create your own custom Metrics and/or Records in the custom Project to feed your new or modified custom View component(s). If so, it is recommended to create On-Demand Metrics/Records where possible.

You can usually build these new custom On-Demand Records or Metrics on top of the existing Records and Metrics that were exposed through your newly added Data Source for the out-of-the-box KAFC Project Data DB.

For Further Information and Training

For further information regarding the features and functionality of the Kofax Insight software, it is recommended to refer to the included documentation which can be found in the Insight installation directory.

More detailed hands-on training for the Insight product can also be arranged through our Professional Services group.