Kofax Analytics Project Customizations

KOFAX

Application Note

Date	September 2018
Applies To	Kofax Analytics for Capture Kofax Analytics for Kapow Kofax Analytics for MarkView Kofax Analytics for Mobile Kofax Analytics for Onboarding Kofax Analytics for TotalAgility Kofax AP Agility Analytics Kofax FraudOne
Summary	This application note provides information about customizing Kofax Analytics projects.
Revision	1.0

Overview

The recommendations in this document are intended to minimize the time and effort required to maintain customizations for Kofax Analytics products, particularly after a product upgrade. These recommendations are made with the assumption that you have a good working knowledge of Kofax Insight, which serves as the "engine" for Kofax Analytics products.

Customizations

In general, we strongly recommend that you do not change any of the following Kofax Analytics out-of-the-box (OOTB) objects or settings, because such changes are not supported and will be overwritten during subsequent product upgrades:

- Objects (such as views or **Error! Reference source not found.**execution plans**Error! Reference source not found.**)
- Settings for formats, constants, parameters, remote services, or reports

Custom views

If a custom view is needed, you can make a copy of the desired view and modify the copy. Do not modify any of the default views.

Records, metrics and other objects used directly in default views will be documented. New Kofax Analytics releases will make every attempt to preserve all documented records, metrics or objects without breaking changes. In the rare case that a breaking change is required, it will be clearly documented in the release notes. Each time the release notes are updated, any breaking changes from the past two major versions will be retained for reference.

Table access

When accessing the Kofax Analytics database directly, use only the tables that are documented in the Kofax Analytics product Administrator's Guide or other documentation. Any other tables are subject to change in subsequent releases. Prior to an upgrade, review the product documentation to identify any changes in the documented records, metrics, or databases.

Two Customization Approaches

Two general approaches are available to customize a Kofax Analytics project, depending on your needs.

1. Modify views with a standard Kofax Analytics license (where available).

Use this approach when OOTB views provide all the data you require, but you want to display the data differently. For instance, you might want to combine views differently or change the charts that are displayed. Consider if the changes you require can be accomplished using bookmarks instead. If this approach applies to your organization, two options are available, as described below.

Option A

Create copies of the views you wish to modify within the OOTB Kofax Analytics project. Keep in mind the following.

- Take care to apply changes only to copies of views. Any changes to OOTB views will be overwritten during subsequent product upgrades.
- Take care to only use documented records and metrics in your modified views. If you use records or metrics that are not documented, then your modified view might not work properly after subsequent product upgrades.

Option B

Reapply changes after each Kofax Analytics product upgrade. Keep in mind the following.

- If you make changes to any existing views, your project is effectively branched from the OOTB Kofax Analytics project. As a result, your changes will be lost (overwritten) during subsequent product upgrades.
- Because changes will need to be reapplied after each Kofax Analytics product upgrade, this option requires a Kofax Professional Services engagement or the availability of a qualified staff member in your organization to modify your Kofax Analytics project.

2. Add data with a full Kofax Insight license.

Use this approach when modifying an existing view simply does not meet your needs. For instance, you might need to add a column to a view or combine data from another source.

With this approach, your project is effectively branched from the OOTB Kofax Analytics project. As a result, Kofax Analytics product upgrades are not supported, and any new features or bug fixes introduced in new versions of Kofax Analytics will not be applied to the project you create.

Several methods are available to configure your project, and the one you select will depend on the needs of your organization. In all cases, start by creating a new project. Then add a data source for the OOTB Kofax Analytics project Data DB, and add all tables to the model.

Each Kofax Analytics project contains core tables that are the building blocks for records, metrics and views. Refer to product-specific documentation for the list of core tables.

Option A

The cleanest way to build your project is to use the core tables from the OOTB Kofax Analytics project, and then create your required views from those tables.

Option B

Another way to build your project is to import views, records, or metrics from the OOTB Kofax Analytics project.

After importing, update each core record/metric/translation table to use the Kofax Analytics project Data DB. (If you are using Kofax Analytics for Capture, see the notes below for alternate steps.) Remove all sources. Add a new source as the DB table in the Kofax Analytics project Data DB. Map all fields. Change the storage option to on-demand and save the record.

When you select this option, the specific steps to ensure data is populated will vary, depending on your scenario. Some examples follow, but they do not describe every possible scenario.

- Stored record/metric: When you create a stored record or metric that combines data from the OOTB Kofax Analytics project with another source, change the OOTB Kofax Analytics core records/metrics to *on-demand* and add them to an execution plan.
- On-demand record/metric: When you create an on-demand record or metric that combines data from the OOTB Kofax Analytics project with another source (which could be another stored record or metric, or an additional source), change the OOTB Kofax Analytics source records/metrics to *stored,* and set up an execution plan to populate the data. Note that if you are using Microsoft SQL Server with all sources on the same server, the records and metrics can be on-demand. For Oracle or Microsoft SQL Server with projects residing on multiple servers, records and metrics must be stored.

Notes - Kofax Analytics for Capture

Due to the product design, additional steps are required any time you import from the OOTB Kofax Analytics for Capture project. For each record in the Source folder, add the source by selecting the DB table from the Kofax Analytics for Capture Data DB and selecting the table with the corresponding name, and then map all fields. When mapping ReceivedTime, answer Yes when prompted to set the time filter. Change the storage option to on-demand and save the record.

If you import the Kofax Analytics for Capture Batch or Document Overview, do the following for both the History/Batch Overview/Overview record and the History/Batch Overview/Document Field Event History record. Right-click the source and select Replace Data Source. Select the Kofax Analytics for Capture Data DB data source, click OK, and save the record.

Best Practices

Follow pre-production practices

The following pre-production practices are required to ensure the success of any customization or upgrade process:

- Perform a full backup of your Admin, Meta, Data, and Staging databases for all Kofax Analytics projects regularly and prior to deploying changes or performing upgrades.
- Be sure to thoroughly test any customizations in a pre-production environment.
- When upgrading your Kofax Analytics product, retest any customizations in a pre-production environment.

Use a Designer role for customizations

To prevent accidental modifications to OOTB Kofax Analytics objects, we recommend that you log in as a user who is assigned to a Kofax Analytics Designer role (instead of the Administrator role) while performing object customizations. The Designer role should not allow modifications to OOTB Kofax Analytics objects. For instructions on how to configure the Designer role, see Appendix A.

Because changes to these objects and settings are overwritten during any Kofax Analytics product upgrade, be sure to carefully document all changes that you make. Also, sufficient time must be allocated to reapply the changes after an upgrade.

Before upgrading, be sure to review the product release notes for any deprecated objects or breaking changes.

Note: If you have a full license, you can select a deprecated object in Insight Studio, and then select Usages from the context menu to see where an object is currently used, and to verify whether it is in use by your customization.

Assign a unique name to customized views

When creating a copy of a view to modify, name it with a specific, unique prefix to ensure that it will not conflict with any Kofax Analytics objects that may be added in future releases.

Example: MyCompany_View1

Integrate customized views

To integrate customized views into the OOTB Kofax Analytics main view, the following procedure is recommended.

1. Start **Studio** to create a “Custom views” folder.

   Note: Your product may already include a predefined “Custom views” folder, such as the one introduced in Kofax Analytics for Capture 2.0. If so, this step is not required and you can proceed to step 2.

Create a "Custom views" folder:

a. Select your project, navigate to **Views** and right-click to open a context menu.
b. Select **New Folder** and name it **Custom views**.

Add a "Custom" menu item:

a. Select the main view.
b. On the **View** toolbar, select the **Menu** tool and drag it to the canvas to add a menu item.
c. When the **Wizards** screen appears, on the **Data** tab, select **Dynamic list of items**, and then select the **Custom views** folder. Save the changes.
   Note: After an upgrade, you may need to re-apply steps a-c.
d. Select **Property Panel > Other**, and select **Hide item if no action and no visible children**.

When you create views in this folder, they will be added automatically to the main menu. If you do not have custom views, the item will be hidden.

2. Place all custom views in the **Custom views** folder.

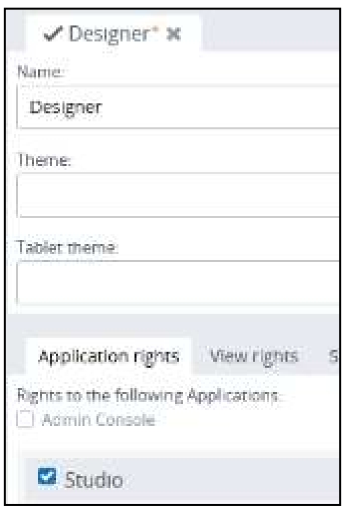
Appendix A: How to Configure the Designer Role

This appendix includes the procedure for configuring a Designer role, which is intended for a user who is performing Kofax Analytics customizations. When the Designer role is properly configured, the user is prevented from making accidental modifications to the OOTB Kofax Analytics project objects. Designer users should be assigned to this role instead of the Administrator role.

Note: Your product may already include a predefined designer role, such as the "kafc designer role" introduced in Kofax Analytics for Capture 2.0. If so, it is not necessary to create another designer role.

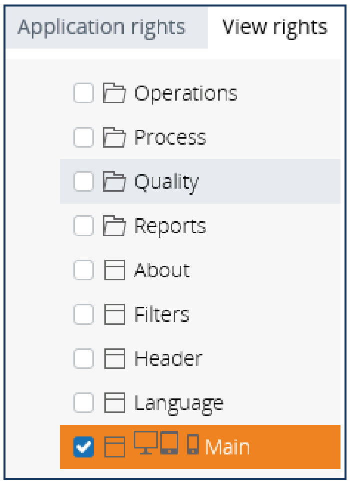
Start the Admin Console and load the Analytics project for which customizations will be made.

1. In the **Documents Tree**, select **Roles > New user role** to add a new role called Designer.
2. Set the rights for the Designer role:
    a. Under **Application rights**, select the **Studio** check box, which grants access to Insight Studio. Also, select the check box for the **Themes and Formats** application.



    b. Under **View rights**, select the top-level check box labeled with the name of your Analytics project. This gives the Designer role the ability to see all views for the project in the dashboard Viewer. Note that the Analytics project name may vary, depending on the Kofax Analytics product you are working with.

c. Under **View rights,** expand the **Views** list, select the check box for **Main**, and then click **PC default** (under the Views list) to set the Main view as the default view for the project on a desktop computer. Optionally click the **Tablet default** or **Phone default** buttons to do the same for a tablet or phone. Once you click the buttons, the applicable icons appear next to the Main view.



d. Under **Studio rights**, select the top-level check box for the **Analytics** project.

e. Open each Analytics object (such as views, metrics, records and more) to **uncheck** the individual items that should not be modified by the person assigned to the Designer role. As a result, the Designer role has **read-only** rights for the unchecked Insight objects, but cannot modify them.

3. Assign the Designer role to a user who will be performing customizations.

4. On the toolbar, click **Save All**.

When the user with the Designer role logs into Studio, the user will not be able to modify the original Analytics objects (views, metrics, records, etc.) but will be able to add custom views and create new records and metrics. The same is true for any user assigned to the Designer role, unless that user is also assigned to another role that grants editing rights.