

Kofax Analytics for Capture Project Upgrade

Application Note

Date	December 3, 2018
Applies To	Kofax Analytics for Capture
Summary	This application note explains how to perform a manual upgrade to Kofax Analytics for Capture 2.0 if the automated upgrade cannot be completed successfully.
Revision	1.0

Overview

The procedure in this document is intended for use in a situation in which the automated method for upgrading to Kofax Analytics for Capture 2.0 cannot be completed successfully. Use this procedure to ensure that Kofax Insight binaries and the Kofax Analytics for Capture 1.2.1 project database are upgraded successfully for use in a Kofax Analytics for Capture 2.0 environment.

Procedure

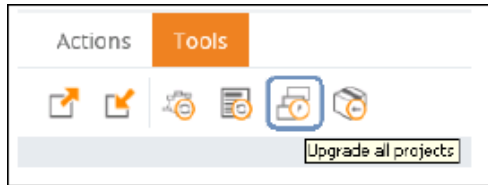
1. Launch an elevated Command Prompt window and navigate to the folder that contains the Kofax Analytics for Capture 2.0 installation files.
 - a. Verify that you have completed the steps to meet the Kofax Analytics for Capture 2.0 prerequisites.
 - b. Restart your computer.
2. Launch an elevated Command Prompt window and navigate to the folder that contains the Kofax Analytics for Capture 5.4.0 installation files.
3. Run the following file:
`Kofax Insight\Bin\KofaxInsightSetup_5.4.0.0.0.2069_x64.msi.`
4. Follow the installer wizard prompts to upgrade from Kofax Insight 5.1 to version 5.4.0.
5. When prompted that the installation is complete, **clear the check box** for the “Launch Insight Install Manager Tool” so that the Insight Installation Manager is not started.
6. Now run the following file:
`Kofax Insight\Bin\KofaxInsightSetup_5.4.0.9.0.2235_x64.msi.`
7. Start **Insight Installation Manager** from the Start menu, and select the following:
 - a. .NET Framework: Select the version that is appropriate for your version of IIS.
 - b. Database: **Use Existing Database**

Note: If the environment will be configured with SSL, update Web.Config to use the SSL Port, which by default is Port 443. Also, ensure that Web.Config files are updated to the correct URL, either manually or using previously tested script method.

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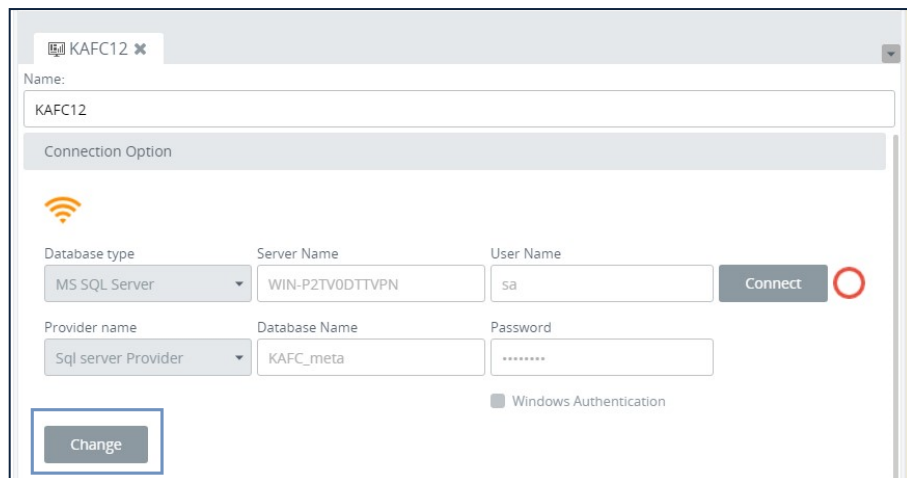
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8. When the Installation Manager is finished, select the option to start **Admin Console**.
 - a. Select **Documents Tree > Projects > *yourprojectname*** (such as K AFC12).
 - b. On the **Tools** tab, on the toolbar, click the **Upgrade all projects** button.

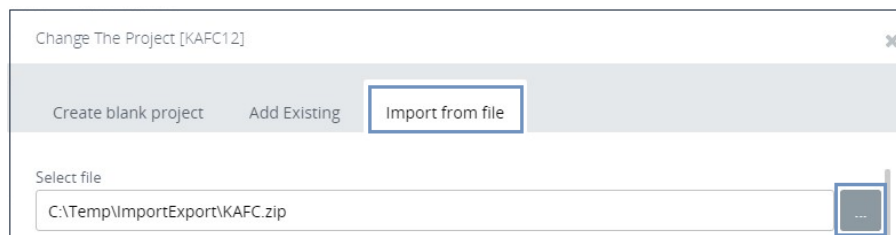


The **Select projects to update** dialog box displays a list of projects.

- c. Select each project to update for use in the new Insight version, and click **OK**.
- d. After the update is complete, click **Close**.
- e. Update the connection strings for the project databases, and click **Change**.



- f. On the **Change The Project** screen, select the **Import from file** tab.



- g. Under **Select file**, click the ellipsis button to locate and select **Kofax Insight\Bin\K AFC.zip** from the folder where the version 2.0 files are copied.
- h. Click **OK** to start the project upgrade. When the upgrade is completed successfully, a confirmation prompt appears.

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9. Start the **Insight Data Loader** and execute the following plans in the order listed:
 - a. **One Time Plan** from **1901-01-01 to Today**
 - b. **Fix 1.2.1.1 Data** from **1901-01-01 to Today**
 - c. **Fix 1.2.1.1 Data for Processes** from **Today to Today**
 - d. **Calculate 2.0 Process Data** from **Today to Today**
 - e. **Calculate 2.0 Data** from **1901-01-01 to Today**
10. Event Listener: Uninstall the KFX Web Agent, and then reinstall the version provided with the Kofax Analytics for Capture 2.0 product installation files. Make sure that the credentials match the ones specified for the Workflow Agent.
11. Workflow Agent: Optionally upgrade the Workflow Agent to the version provided with the Kofax Analytics for Capture 2.0 product installation files.
12. Perform Kofax Capture batch processing verification.
 - a. Publish batch classes and verify that no errors occur.
 - b. Process a batch through the batch class workflow and confirm that the related data displays successfully on the Kofax Analytics for Capture dashboard viewer.