

# Kofax Analytics for Capture 2.0.0.x Upgrade

*Application Note*

<b>Date</b>	July 24, 2019
<b>Applies To</b>	Kofax Analytics for Capture 2.0.0.x
<b>Summary</b>	This application note explains how to upgrade Kofax Analytics for Capture 2.0.0.x to version 2.0.0.2 or 2.1.0 in an environment that supports Cluster Servers and High Availability Setup.
<b>Revision</b>	1.0

## Overview

This document explains how to upgrade Kofax Analytics for Capture 2.0.0.x in an environment that supports Cluster Servers and High Availability Setup. Follow the upgrade procedure that applies to your situation:

- [Upgrade from Kofax Analytics for Capture 2.0.0.x to 2.0.0.2](#)
- [Upgrade from Kofax Analytics for Capture 2.0.0.x to 2.1.0](#)

This application note is based on following documentation:

1. The “Example: Insight setup for High Availability using IIS” section of the *Kofax Insight 6.0 Technical Architecture High Availability Setup Guide*.
2. The “High Availability” section of the *Kofax Analytics for Capture 2.0 Administrator's Guide*.

## Upgrade from Kofax Analytics for Capture 2.0.0.x to 2.0.0.2

### Upgrade Insight

Before proceeding with the upgrade to Kofax Analytics for Capture 2.0.0.2, verify that you have Administrator rights and do the following:

- a. Temporarily disable User Account Control (UAC).
- b. Temporarily disable your antivirus software.
- c. If applicable: For load balancing mode using IIS ARR, you must set all servers in the server farm to the Unavailable state.

### Important Notes:

- Fix pack 2.0.0.2 is intended as an update to Kofax Analytics for Capture 2.0.0 or 2.0.0.1. If you are working with an earlier version of the product, you must upgrade to Kofax Analytics for Capture 2.0 before installing fix pack 2.0.0.2.
- Fix pack 2.0.0.2 requires an upgrade to the Insight and Event Listener components. To ensure successful results, continue to the upgrade procedure for Insight and then see [Update the Event Listener](#).
- If you plan to use Kofax Analytics for Capture 2.0.0.2 with Kofax Capture 11, a Workflow Agent upgrade is also required if your organization requires the lowest possible number of queries on the Kofax Capture statistical database. If not, you can continue to work

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with the same Workflow Agent used with Kofax Analytics for Capture 2.0.0. See [Update the Workflow Agent](#).

### Upgrade Insight on a single server node

1. Copy the compressed Kofax Analytics for Capture product file, **KofaxAnalyticsForCapture-2.0.0.2.ZIP**, into a folder and extract the contents. Do not use a shared network folder.
2. Copy the entire contents of the Kofax Insight folder provided with Kofax Analytics for Capture 2.0.0.2 to the server node where the existing instance of Insight is installed.
3. Run **KAFC\_Installer.exe** as an Administrator.
4. If prompted, enter the login credentials for the Insight Administrator. Or, if using Windows Authentication in Insight, log in as a user that is mapped to the Insight Administrator role.
5. When the Insight Fix Pack Installation screen appears, use the **Project Name** list to select the name of your existing Kofax Analytics for Capture 2.0.0 project.
6. Click **Install** to start the fix pack installation.  
While the installation is in progress, the status is listed in the **Results** box. The installation log file is available here:  
  
`C:\Temp\SetupInsight_YYYY.MM.DD.log`
7. When notified that the installation is completed, click **OK** to clear the message and exit the installer.

### Upgrade Insight on subsequent server nodes

8. On subsequent nodes, you need to run only Kofax Insight 5.4.0 Fix Pack 13, which is available here:

`[Kofax Analytics for Capture Installation]\Kofax Insight\Bin\KofaxInsight_5.4.0.13.0.2269_x64.msp`

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### After the upgrade to version 2.0.0.2

1. For all nodes, do the following:
  - a. Enable User Account Control (UAC).
  - b. Enable your antivirus software.
  - c. Set all servers to Available in IIS server farms on the load balancer.
2. Synchronize the update among the Insight servers:
  - a. Using your browser, start **Admin Console** and change to **Edit** mode to synchronize the update among the Insight servers.
  - b. Switch back to **View** mode to access the Insight Viewer.

### Upgrade the Event Listener

**Note:** In a High Availability and Load Balancing environment, each server will have to upgrade the Event Listener once. In case of Load Balancing mode using IIS AAR, you must set all servers in the Server farm to the Unavailable state prior to upgrading the Listener.

1. Turn off the Load Balancer.
2. Upgrade each instance of the Event Listener according to the instructions in the *Kofax Analytics for Capture 2.0.0.2 Release Notes*.
3. Turn on the Load Balancer.

### Upgrade the Workflow Agent

To upgrade the Workflow Agent, follow the instructions in the *Kofax Analytics for Capture 2.0.0.2 Release Notes*.

## Upgrade from Kofax Analytics for Capture 2.0.0.x to 2.1.0

### Upgrade Insight

Kofax Analytics for Capture 2.1 uses Insight 6.0.0.5, which cannot be upgraded using the Kofax Analytics for Capture installer. You must upgrade all Insight server nodes to 6.0.0.5 first. See the *Kofax Insight 6.0 Installation Guide* for details on upgrading Insight 5.4 to 6.0.0.5 in a High Availability environment.

1. Verify that Insight is set to **Edit** mode.
2. In the Admin Console, select the **KAFC** project in the Documents Tree.
3. On the **Connection Option** screen, click the **Change** button.

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4. Select the “**Import from file**” tab and browse to one of the following, as applicable:
  - K AFC\_MSSQL.zip
  - K AFC\_Oracle.zip
5. Verify the database connection details, and then click **OK**.
6. In the Documents Tree, select **Projects > K AFC > Stats DB**, and update the applicable information for the Kofax Capture statistical database.
7. Switch to **View** mode to access the Insight Viewer.

### Run Execution Plans

1. Start the **Insight Data Loader**
  2. Execute the following plans in the order listed:
    - a. **One Time Plan** from **Beginning of times** to **Current time**
    - b. **Calculate 2.0.0.2 Data** from **Beginning of times** to **Current time** \*
    - c. **Fix 2.0 Data** from **Beginning of times** to **Current time** \*
    - d. **Calculate 2.1 Data** from **Beginning of times** to **Current time**
    - e. **Fix 2.1 Data** from **Beginning of times** to **Current time**
- \* Skip plan if you are upgrading from Kofax Analytics for Capture 2.0.0.2.

### Upgrade the Event Listener

**Note:** In a High Availability and Load Balancing environment, each server will have to upgrade the Event Listener once. In case of Load Balancing mode using IIS AAR, you must set all servers in the Server farm to the Unavailable state prior to upgrading the Listener.

1. Turn off the Load Balancer.
2. Upgrade each instance of the Event Listener according to the instructions in the *Kofax Analytics for Capture 2.1 Administrator’s Guide*.
3. Turn on the Load Balancer.

### Upgrade the Workflow Agent

To upgrade the Workflow Agent, follow the instructions in the *Kofax Analytics for Capture 2.1 Administrator’s Guide*.

### Post-Upgrade Verification Steps

To verify that your upgrade is successful, follow this procedure.

1. Check the Kofax Analytics for Capture About box to verify the version number:
  - For upgrades to version 2.0.0.2: **2.0.0.2.0.457**
  - For upgrades to version 2.1.0: **2.1.0.0.0.164**
2. Check the Insight Admin Console About box to verify the version number:
  - For upgrades to version 2.0.0.2: **5.4.0.13.0.2269**
  - For upgrades to version 2.1.0: **6.0.0.5.0.2715**
3. In the Kofax Capture **Administration** module, on the **Analytics** tab, click **Configure URL** to open the **Kofax Analytics for Capture** dialog box. Then use **Test Connection** to verify that the Event Listener user credentials are valid.
4. Create a test batch, finish processing it, and then:
  - a. Go to `\CaptureSV\Logs\<Kofax Analytics log folder>` to verify that no error logs exist.
  - b. Verify that batch data is recorded and displayed in the Batch Search view in the Kofax Analytics for Capture dashboard.

### Troubleshooting

If the View page is redirected to an invalid URL after a period of time, add the following setting to web.config for Insight View web page (`\HtmlInsight\View\web.config`) to resolve the issue.

```
<appSettings>  
  <add key="aspnet:UseHostHeaderForRequestUrl" value="true"/>  
</appSettings>
```