

Administrator's Guide

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Table of Contents

Preface	5
Related Documentation	5
Training	5
Getting Help for Kofax Products	5
Introduction	7
Dashboard Overview	7
Views	7
System Requirements	8
Hardware	8
Insight Server	9
Software Prerequisites	9
IIS Web Server	9
Metadata Repository	12
Database Driver	12
Oracle	12
Dashboard Clients	14
Installing and Configuring Analytics for Kapow	15
SSL	15
Databases	15
Installing Kofax Insight	16
Configuring the Database	16
Activating the License	19
Installing Analytics Bundle	19
Configuring Your Project	20
Windows Authentication	22
Configuring Insight for Windows Authentication	22
Setting Up HTTP Request Authentication	23
Using Kofax Analytics for Kapow	25
Viewer	25
Opening the Viewer	25
Viewer Screen Layout and Navigation	27
Using the Viewer	28
Exporting to Excel	28

Kofax Analytics for Kapow Views	28
Overview	29
Clusters	31
Projects	32
Schedules	33
Index	35

Preface

This guide includes instructions for installing and using Kofax Analytics for Kapow. Read this guide completely before using the software. The guide is written with the assumption that you have a basic understanding of Kofax Analytics for Kapow.

Related Documentation

In addition to this guide, Kofax Analytics for Kapow documentation set includes the following:

- *Kofax Analytics for Kapow Release Notes*: Contains late-breaking product information not included in this guide. You can download the release notes from the Kofax website at www.kofax.com.
- Kofax Insight Documentation: After completing the installation procedure in this guide, you can access a set of guides related to Kofax Insight. These guides are available in the Documentation folder within your Insight installation.

Training

Kofax offers computer-based training to help you make the most of your Kofax Analytics for Kapow solution. Visit the Kofax website at www.kofax.com for details.

Getting Help for Kofax Products

Kofax regularly updates the Kofax Support site with the latest information about Kofax products.

To access some resources, you must have a valid Support Agreement with an authorized Kofax Reseller/ Partner or with Kofax directly.

Use the tools that Kofax provides for researching and identifying issues. For example, use the Kofax support site to search for answers and messages, keywords, and product issues. To access the Kofax Support page, go to www.kofax.com.

The Kofax support page provides:

- Product information and release news.
Click a product family, select a product, and select a version number.
- Downloadable product documentation.
Click a product family, select a product, and click **Documentation**.
- Access to product knowledge bases.
Click **Knowledge Base**.

- Access to the Kofax Customer Portal (for eligible customers).
Click **Account Management** and log in.
- Access to support tools.
Click **Tools** and select the tool to use.
- Information about the support commitment for Kofax products.
Click **Support Details** and select **Kofax Support Commitment**.

Use these tools to find answers to questions that you have, to learn about new functionality, and to research possible solutions to current issues.

Note To optimize your use of the support portal, go to the Kofax Customer Portal login page and click the link to open the *Guide to the Kofax Support Portal*. This guide describes how to access the support site, what to do before contacting the support team, how to open a new case or view an open case, and what information to collect before opening a case.

Chapter 1

Introduction

Kofax Analytics for Kapow is an extension of Kapow that produces a graphical business intelligence dashboard based on near real-time data collected during the workflow.

Use the dashboard to display views based on data stored within the Kofax Analytics for Kapow database.

Dashboard Overview

The Kofax Analytics for Kapow dashboard (also called the "Viewer") consists of several predefined interactive views.

Views

- [Overview](#)
- [Clusters](#)
- [Projects](#)
- [Schedules](#)

Chapter 2

System Requirements

Most software requirements for Kofax Analytics for Kapow, including the supported versions of Kapow, are listed on the *Cross Product Compatibility Matrix* on the Kofax website at www.kofax.com. The matrix is updated regularly, and we recommend that you review it carefully before installing your product.

This chapter is intended to supplement the *Cross Product Compatibility Matrix* and to offer information about hardware requirements and other prerequisites.

Hardware

Hardware requirements vary, based on the specifics of your deployment.

Each server should have sufficient power and resource levels to support the anticipated load on all applications that are running. Use the following parameters as guidelines for the requirements of the Insight server.

Note The Insight server hosts the Insight software. It contains the databases in Kapow and databases for Insight which are linked to Kapow.

Processor

The Insight software runs on 32-bit and 64-bit based machines with a minimum 2-GHz clock speed. Production servers should have, at minimum, a dual-core configuration with a 1.8-GHz clock speed. Configurations that combine database and Insight servers should have at least a quad-core configuration.

RAM

The total required memory depends on the number of individual source database records being processed (assuming that all resources are available for the Insight servers). The following table lists reference values.

Number of Records	Dedicated Computer	Additional DB Server	Available RAM on Database Server
<1M	6 GB	8 GB	2 GB
1M-5M	8 GB	12 GB	4 GB
>5M	16 GB	24 GB	8 GB

We recommend that you install your Insight server on a server that differs from your database server and other Kofax servers.

Installing the Insight server on the same server as your database server or other Kofax servers can impact production throughput. Consider the preceding resource requirements as added requirements over the resources required by the database vendor for Insight-related operations.

Note Use of data compression capabilities of database servers (such as SQL Server 2012 Enterprise) must also be factored into the overall CPU load calculations when you use a shared-server configuration.

Insight Server

The Kofax Insight software runs on a 64-bit based server with a minimum 2.7 GHz quad core clock speed, or better.

We recommend that you install Insight on a server that differs from your database or other servers. If the Insight server is installed on the same server as your database server or other Kofax servers, it may impact production throughput. The resource requirements for the Insight server must be considered along with the requirements defined by the database vendor for Insight-related operations.

Software Prerequisites

Most software requirements for Kofax Analytics for Kapow, including the supported versions of Kapow, are listed on the *Cross Product Compatibility Matrix* on the Kofax website at www.kofax.com. The matrix is updated regularly, and we recommend that you review it carefully to ensure success with your product.

Also, the following software should be in place before you proceed with the installation.

- **Runtime Framework:** .NET 4.5.1 or later
- **IIS:** Version 7 or later

IIS Web Server

Internet Information Server (IIS) must be enabled and configured. While IIS is provided with all Windows servers, it is not installed by default; you must ensure that the installation is complete.

Important When you configure Insight on IIS, the application pool (default or custom) must be .NET v4.5 (Windows Server 2012) or .NET v4.0 (Windows Server 2008).

When using a custom application pool, you must have a dedicated application pool that contains the DataFileProcessorService with the LocalSystem identity. If you use an Active Directory account for an application pool, it must have the same level of permissions as the NetworkService and LocalSystem identities.

Configuring IIS

If you use the default configuration for IIS, Internal Server Error messages may appear during the product installation process. You can prevent the errors by configuring IIS according to the steps provided here. Also, review the list of [IIS settings](#) that should be selected.

1. Using Control Panel, navigate to **Administrative Tools > Server Manager**.
2. In Server Manager, under Features Summary, click **Add Features**.
3. In the Add Features window, under .NET Framework Features, select the most current .NET Framework version.
4. In the Add Features window, under .NET Framework <version> Features-WCF Activation, select **HTTP Activation**.
5. Click **Next**.
6. In Server Manager, under Roles Summary, click **Web Server (IIS)**.
7. In the Web Server (IIS) management window, click **Add Role Services**.
8. In the Add Role Services window, expand Web Server and Application Development.
9. Select **ASP.NET** and click **Next** to start the installation.

IIS Settings

This section lists the Internet Information Services (IIS) settings to select for [IIS 8](#) and [IIS 7](#).

IIS 8 Settings

Kofax Analytics for Kapow works with the default settings for IIS 8, as listed here. After you install Kofax Analytics for Kapow, some additional IIS 8 settings are added, and they are listed with an asterisk.

Common HTTP Features:

- Static Content
- Default Document
- Directory Browsing
- HTTP Errors

Security

- Request Filtering

Health and Diagnostics

- HTTP Logging

Performance

- Static Content Compression

Management Tools

- IIS Management Console

Application Development

- .NET Extensibility 4.5*
- ASP.NET 4.5*
- API Extensions*
- API Filters*

WCF Services

- HTTP Activation*

IIS 7 Settings

When using Kofax Analytics for Kapow with IIS 7, select the settings listed here.

Common HTTP Features:

- Default Document
- HTTP Redirection
- Static Content

Application Development:

- .NET Extensibility
- ASP.NET
- ISAPI Extensions
- ISAPI Filters

Security

- Basic Authentication
- Client Certificate Mapping Authentication
- IIS Client Certificate Mapping Authentication
- URL Authorization
- Windows Authentication

Performance

- Static Content Compression
- Dynamic Content Compression

Management Tools

- IIS Management Console
- IIS Management Scripts and Tools
- Management Service

Under WCF Services for the .NET 4.5 Framework

- HTTP Activation (must be selected for Windows 8, Windows Server 2012, or later)

Metadata Repository

Kofax Analytics for Kapow stores metadata and calculated key performance indicators in Microsoft SQL Server, MySQL, or in Oracle. The server used for storage can be a separate server or a new database on any existing server for which you have specific database owner (DBO) privileges.

If you wish to use a separate server, install it prior to installing Kofax Analytics for Kapow. For SQL databases, ensure you have installed Microsoft SQL Server Studio or Studio Express.

Note If you are not using an enterprise level database management system, you can install SQL Server Express Edition, which is available here:

<http://www.microsoft.com/en-us/sqlserver/editions/2012-editions/express.aspx>

Database Driver

Kofax Analytics for Kapow must have access to the data you want to analyze. If the database is accessed over a network connection, you must also verify the necessary security/firewall settings and the availability of the necessary drivers for the target databases.

Oracle

If you plan to use Oracle, you must create an empty schema for each database (staging, metadata, data, and admin) before installing Kofax Analytics for Kapow.

Create an empty schema where you want to store Kofax Analytics for Kapow information. The user name provided when you install Kofax Analytics for Kapow must have the schema set as the default schema for that user. The user must also have user rights to create objects in that schema.

Database Client Software Requirements

Kofax Analytics for Kapow requires the use of Microsoft .NET data providers for Oracle database management systems. The Microsoft .NET data providers for Oracle are installed by the client software on each workstation. The supported version of the client software is ODP.NET with 64-bit ODAC 11.2 Release 5 (11.2.0.3.20) or later, which can be used to connect to a lower version of the Oracle database.

Unicode

To ensure full support for multi-byte character sets, verify that the AL32UTF8 character set for Unicode is selected when you configure Oracle.

Tablespace Creation

A dedicated Oracle tablespace for Kofax Analytics for Kapow database objects is recommended, but not required. If you create a dedicated tablespace, identify it as the default tablespace for the Kofax Analytics for Kapow user. Additionally, the Kofax Analytics for Kapow user needs adequate quota on the tablespace to maintain the application schema.

Kofax Analytics for Kapow does not support separation of object types into separate tablespaces. All Kofax Analytics for Kapow application objects are stored in a single tablespace. The separation of tables and indexes may be included in a future release.

Note Be sure that your tablespace configuration complies with best practices for Oracle. See the Oracle website for more information.

Tablespace Usage Information

The following sizing information is intended as a guideline for preparing your database to hold Kofax Analytics for Kapow data.

Sample create tablespace statement:

```
create tablespace <tablespace name>
datafile '<tablespace file name and path>'
size <size>;
```

Because your installation will gather and store user tracking information, be sure to allow sufficient space for statistical tables.

Creating User Privileges

To use Kofax Analytics for Kapow with an Oracle database, the application owner must already exist in the database. This user requires certain privileges to ensure that Kofax Analytics for Kapow is installed properly and operates successfully after installation. After installation, Kofax Analytics for Kapow uses this database user account to connect to the database for all subsequent database-related operations.

1. Verify that the user has database level authentication.
2. Verify that the user has quota on the appropriate tablespace for the Kofax Analytics for Kapow data.
3. Verify that the user has the Kofax Analytics for Kapow data tablespace identified as the default tablespace.
4. Verify that the user has the following system privileges to install and use Kofax Analytics for Kapow:
 - CONNECT: System role that enables the Kofax Analytics for Kapow database user to create a connection to the Oracle database.
 - CREATE TABLE: Allows creation of all Kofax Analytics for Kapow tables and supporting objects, including indexes and Large Object (LOB) types.
 - CREATE SEQUENCE: Allows creation of all sequences needed by Kofax Analytics for Kapow.
 - CREATE PROCEDURE: Allows the database user to create all procedures and functions needed by Kofax Analytics for Kapow.
 - CREATE VIEW: Allows the user to create the views on top of the Kofax Analytics for Kapow tables.

Sample create user and grant statement:

```
CREATE USER <username>
IDENTIFIED BY <password>
DEFAULT TABLESPACE <tablespacename>
QUOTA UNLIMITED ON <tablespacename>;
/
grant CONNECT, CREATE TABLE, CREATE VIEW, CREATE SEQUENCE, CREATE PROCEDURE
to <user name>;
```

/

Dashboard Clients

Computers that run the Kofax Analytics for Kapow Dashboard in either Designer or Viewer mode require a web browser, access to the computer running the IIS instance hosting the dashboard, and HTML 5. The minimum configuration for these computers is Windows 7 with 4 GB RAM and a microprocessor with a clock speed of at least 2 GHz.

Chapter 3

Installing and Configuring Analytics for Kapow

Follow the instructions in this chapter to perform a new Kofax Analytics for Kapow 2.0.0 (Draft) installation. The installation includes setup and runtime components.

Important For correct display of data in the Insight Dashboard, make sure Java correctly sets the time according to your time zone on RoboServers and computers running Management Consoles. See the *Timezone Data Versions in the JRE Software* on the Oracle web site for the latest updates in time zones. If necessary, use the *Timezone Updater Tool* to update the time zone information.

Your product includes the files you need to successfully install the required Kofax Analytics for Kapow components. See the following table.

Component	Required File
Kofax Insight	KofaxInsightSetup_xxx.msi
Kapow Analytics Bundle	KAFKA.zip

SSL

If you initially perform the Kofax Analytics for Kapow installation without SSL, you can switch to SSL later. You can switch to SSL by reinstalling both Kofax Insight (with the "Use Existing Database" option).

Databases

Use a new or existing database management system instance to create the following databases for use with Kofax Analytics for Kapow:

- **Metadata:** Stores configuration information such as metric definitions and calculation logic. Assign a name such as `kafk_meta`.
- **Data:** Stores the processed records and metrics. You can assign any name, such as `kafk_data`.
- **Admin:** Stores Insight administrative data related to users, roles, filtering, alerts, logs, and more. Assign a name such as `kafk_admin`.
- **SSO:** Stores information required for using the [HTTP Request Authentication](#). Assign a name such as `sso`.

Note We recommend that you use a consistent naming convention for each database, such as `kafk_meta`, `kafk_data`, and `kafk_admin`.

Although the installation procedure in this guide assumes that you are using SQL Server databases, Oracle and MySQL are also supported.

- SQL Server: The staging database must be created before you start the product installation; you can have the installer create or initialize the other databases.

You must have a database account with sufficient rights to create the required databases, and to create and modify database tables. Otherwise, you must first create databases prior to installing the product. In the latter scenario, you define a user with database ownership rights and then manually create the databases and individually assign ownership rights to each one.

- Oracle: All database schemas must already be in place before you proceed with the product installation. See [Oracle](#).

Installing Kofax Insight

Use the procedure in this section to install Kofax Insight.

1. Install the version of Kofax Insight provided in your Kofax Analytics for Kapow product installation files by running **KofaxInsightSetup_xxx.msi**.
2. When the Kofax Insight Setup Wizard welcome screen appears, click **Next**.
3. Review and accept the license agreement terms, and click **Next**.
4. On the next screen, select **Full environment** and click **Next**.
5. On the "Custom setup" screen, accept the default selections. Optionally, use **Browse** to navigate to another location for your installation, and then click **Next**.
6. Click **Install** to start the installation.
7. When notified that the installation is complete, click **Finish** to exit.
When the Kofax Insight Installation Manager appears, proceed to [Configuring the Database](#).

Configuring the Database

Use the Kofax Insight Installation Manager to configure databases for use with Kofax Analytics for Kapow. You will need the authentication credentials for your Kapow database and Kofax Analytics for Kapow databases.

1. Verify that the Insight Installation Manager is set to launch after completing the procedure in [Installing Kofax Insight](#).

If not, navigate to **Altosoft > Administration > Installation Manager**.

Installation Manager - Insight Engine Database Configuration Screen

Insight Engine Database Configuration

Connection Type:

SQL Server Name:

☐ Windows authentication

Authentication

Login:

Password:

Databases

☒ Create/Initialize Database ☐ Use Existing Database

Administration Database Name:

Important You must have a database account with sufficient rights to create the Insight admin database. If the admin database already exists, database ownership permissions are sufficient.

- Under Insight Engine Database Configuration, enter the connection type, server name, and authentication credentials to use for the Kofax Analytics for Kapow admin database.
- Select **Create/Initialize Database**, enter the name of your administration database (such as kafk_admin), and click **Next**.

The Insight Web Applications IIS Settings screen appears.

Installation Manager - Insight Web Applications IIS Settings

Insight Web Applications IIS Settings

TCP Port: ☐ Use SSL connection

Application Pool

Application Pool Name:

Web Site Name:

You may create new application pool in IIS for Insight or use one of the existing pools.
The selected pool must use .NET Framework 4.0 and have the Managed Pipe Mode as Integrated.
Contact your system administrator if you are not sure about the properties of the existing pools.

Insight Data Services Settings

☐ Enforce password policy

Administrator password:

☐ Use remote Insight Data Service

Use this option if you would like to install the Data Services on a remote server.

Host: TCP Port: ☐ Use SSL connection

4. On the Insight Web Applications IIS Settings screen, Specify Administrator password under Insight Data Services Settings and update other settings as necessary. Click **Next**.

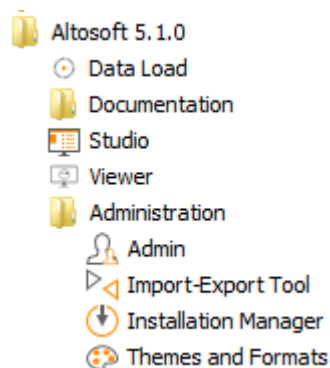
Note The recommended Application Pool is .NET v4.5 (Windows Server 2012) or .NET v4.0 (Windows Server 2008). You can also type a name for an application pool that does not yet exist; in this case, Kofax Analytics for Kapow creates the application pool automatically during the installation. For more information about creating a custom application pool, see [IIS Web Server](#).

The Kofax Insight Installation Details screen appears.

5. On the Kofax Insight Installation Details screen, review the Administration database and IIS settings. If necessary, click **Previous** to change a setting; otherwise, click **Next** to proceed with the component installation.
As components are installed, the progress appears on the screen.
6. When notified that the installation is finished, click **Next**, and then click **Admin Console**. Proceed to [Activating Your License](#).

Post-Installation Results

After you complete the Kofax Altosoft installation, a new program folder appears on your disk, similar to the illustration.



Here is a summary of the items in the Altosoft program folder:

- Data Load: Tool for running plans that collect data from your Kapow installation for use in Kofax Analytics for Kapow dashboard views
- Documentation: Folder that contains Kofax Insight documentation in PDF format
- Studio: Tool for managing project metadata and designing custom views; requires an appropriate license.
- Viewer: Supports a standard display of dashboard views in your browser
- Administration
 - Admin: Kofax Insight administration tool
 - Import-Export Tool: Tool for importing or exporting Insight project settings related to views, records, and metrics
 - Installation Manager: Wizard that walks you through configuration of your database

- **Themes and Formats:** Tool for applying a theme that affects the color scheme and appearance of different dashboard components; also includes settings for updating date and time formats that appear on the dashboard.

Activating the License

Use this procedure to activate the product license provided to you at the time of product purchase.

1. Navigate to **Altosoft > Administration > Admin**.
2. On the navigation panel, click **License manager**.
3. In the Licenses section, click **Click here to add new data**.
The "Add new license" window appears.
4. Select **Add new license from file** and click **OK**.



The Choose file to Upload window appears.

5. Navigate to the location where you saved the license file provided by Kofax at the time of product purchase.
6. Select the license file and click **Open**.
The license is activated.
7. On the toolbar, click **Logout** to close the License Manager.
8. Log out of Insight Admin.
9. Proceed to [Configuring Your Project](#).

Installing Analytics Bundle

Your installation package includes KAFKA.zip, a project that contains built-in views, records, and metrics for Kofax Analytics for Kapow.

Extract the **KAFKA.zip** file to the Insight installation folder (for example: `C:\Program Files Altosoft \Insight 5.5.0\`) replacing all files when asked. As a result, the KAFKA_bundle.zip and other necessary files become available.

Configuring Your Project

Use this procedure to start Insight Admin to import KAFKA-Project.zip, a project that contains built-in views, records, and metrics for Kofax Analytics for Kapow.

1. Navigate to **Altosoft > Administration > Admin**.

2. Enter the login credentials for the Administrator.

The default administrator login credentials are:

- Login name: Administrator
- Password: password

You can change the default values during the installation.

3. In the navigation panel, click **Authentication**.

4. Set the Authentication Method to **User's logins and passwords are defined within Insight platform. Users are explicitly linked to roles**.

If you are using Windows Authentication, apply additional settings. See [Configuring Insight for Windows Authentication](#). If you want to use the single sign-on authentication, see [Setting Up HTTP Request Authentication](#).

☐ No authentication. Any user is welcome to see any dashboard.

☒ User's logins and passwords are defined within Insight platform. Users are explicitly linked

User properties are obtained from the environment:

☐ Windows

☐ HTTP Request

☐ Login panel

And then user roles and access rights are determined by comparing these values to:

☐ External database

☐ Fixed values

5. After setting the Authentication Method, click **Save**.

6. In the navigation panel, click **Projects**, and then right-click it and select **New Project**.
The New Project window appears.

7. Type **KAFKA** as the project name and click **OK**.

The Create New Project [KAFKA] window appears.

8. Click the **Import from file** tab, and then click **Select file**. Select **File is located on the client computer and will be copied to the server for processing**.

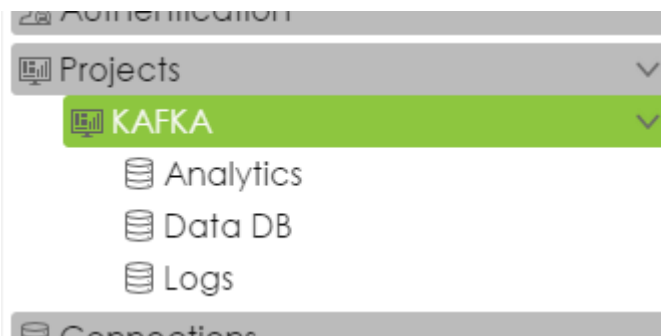
The File Upload window appears.

9. Navigate to your product installation files, select **KAFKA_bundle.zip**, and click **Open**.
10. Set the database connection information for the Meta and Data databases.

Tip If the server details are nearly the same for the Meta and Data databases, select **Same server as the meta database** to copy the entries from the Meta section into the Data section. After the entries are copied, be sure to update the database name in the Data section.

11. If the databases already exist, you can click **Connect** to test each one.
The circular indicator turns green if the connection is successful.
12. Click **OK** to import the project.
13. When prompted to confirm database creation, click **Yes**.
An indicator appears on the screen while the project import is in progress.
The built-in views, records, and metrics for Kofax Analytics for Kapow are added to your installation.
14. When the import is complete, click **OK** to clear the message confirming successful data import.
15. Expand the newly created project and verify that you have the following databases:
 - **Data DB**: Insight data warehouse
 - **Analytics**: Reporting database that you have configured in Kapow
 - **Logs**: Log database that you have configured in Kapow

To expand the project, click the arrow to the right of the project name.



16. If required, update the details for each of the databases such as the Server name, Database name, User and password.
17. To verify server and user details, double-click **DataDB** and click **Test Connection**.
A success message appears for a successful connection.
18. Click **Save All** to save your configuration.

Windows Authentication

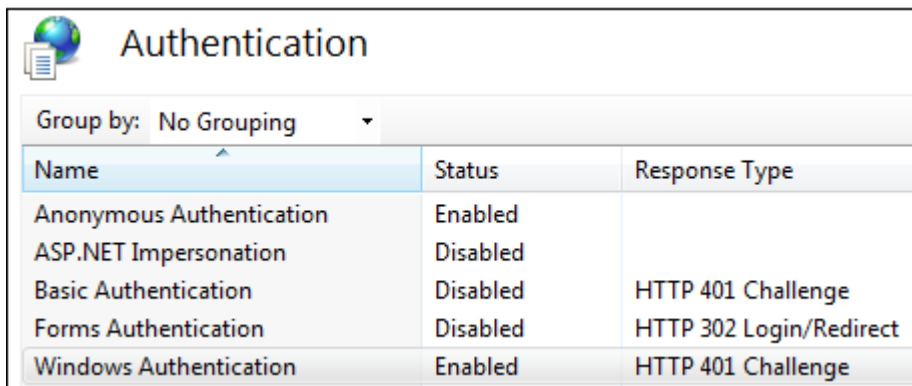
If you are using Windows user authentication, access to all Kofax Analytics for Kapow databases must be given to the following:

1. User account used to perform the Kofax Analytics for Kapow installation
2. Account/identity for the IIS application pool
3. Account/identity for the Insight Scheduler service

Configuring Insight for Windows Authentication

Use the procedure in this section to configure Kofax Insight for Windows Authentication.

Before configuring Insight, select Windows authentication in IIS for the web application (default website).



Name	Status	Response Type
Anonymous Authentication	Enabled	
ASP.NET Impersonation	Disabled	
Basic Authentication	Disabled	HTTP 401 Challenge
Forms Authentication	Disabled	HTTP 302 Login/Redirect
Windows Authentication	Enabled	HTTP 401 Challenge

1. Navigate to **Altosoft > Administration > Admin**.
2. In the navigation panel, click **Authentication**.
3. Click the **Authentication Method** tab and select the following:
 1. User properties are obtained from the environment: **Windows**
 2. And then user roles and access rights are determined by comparing these values to: **Fixed values**
4. User identifier: Specify a way to get the user's ID. The ID should be constant for a specific user's login. Usually, it is a session property (Identity) that looks to the Active Directory domain and user name.
 1. In the navigation panel, click **User mapping**.
 2. On the User Mapping tab for User Identifier (UID), set the "Session property" to **Identity**.
5. Set session properties for User Name and Email.
 1. On the User Mapping tab for User Name, set the "Session property" to **FullName**.

User Name is the display name of a user account. Usually, it is one of the Active Directory properties, such as *Identity*, *name*, *FullName*, *displayName* or another convenient property. Your Domain Admin can provide all available Active Directory properties.

2. On the User Mapping tab for Email, set the "Session property" to **EmailAddress**.

Email is the email address of the user account. It is used for self-subscriptions only. Usually, it is the Active Directory property *mail* or *EmailAddress*. Your Domain Admin can provide you with all available Active Directory properties.

Mapping Roles

Roles define a set of predefined Admin settings such as the theme, date format, etc. Also, roles define specific access rights to projects and dashboard views. It's necessary to describe mapping rules for each role. Usually, the Active Directory property *memberOf* is used. In the sample illustration, users with the Active Directory property *memberOf*, including the *adminGroup*, are assigned to the KAFK admin role. Your Domain Admin can provide you with all available Active Directory properties.

Each row in the mapping grid uses the **AND** operand. If multiple roles on the Roles list match conditions for a user account, the access rights are merged from all matching roles, while other settings (such as the theme or date format) are assigned by the top matching role on the list.

✓ KAFK view role

✓ KAFK admin role ✕

Name:

KAFK admin role

Theme:

Kofax theme ▾

Tablet theme:

Kofax theme ▾

Application rights

View rights

Studio rights

Fixed values mapping

External DB mapping ▾

Property	Operator	Value	
memberOf	Equal	adminGroup	✕

[Click here to add new data](#)

Setting Up HTTP Request Authentication

Perform the following steps to authenticate Kofax Analytics for Kapow users as Insight users.

1. In Kapow Management Console, go to **Admin > Settings**.
 1. Select **Kofax Insight Dashboards** in the left pane, click **Allow Dashboards** and specify the Insight server URL.
 2. Select **Single Sign-On**, click **Use Single Sign-On** and specify a [Single Sign-On database](#) to be used by Kofax Insight.
2. Navigate to **Altosoft > Administration > Admin**.
The Insight Admin page appears.

3. Enter login information and click **OK**.

Note The default user name is *Administrator*, and the password you specified during the initial [database configuration](#).

4. On the navigation panel, click **Authentication**.
 1. Click **HTTP Request** and **External database**.
 2. Select **Use Insight users for login to the Studio**.
5. On the navigation panel, click and expand **Connections**.
Verify that **SSOConnection** is selected.
6. In the Connection Option group, complete the entries as applicable to your SSO database that you set up in the Kapow Management Console.
7. On the navigation panel, click and expand **User mapping**.
 1. Select **Use User Name** under User Identifier (UID).
 2. Under User Name, select **Deny authentication for users with undefined name**, click **Database Query** and select **SSOConnection** from the **Source** list.
 3. Select the database type you use in the **Database** list and specify the following SQL query.

```
select USERNAME from ALTOSOFT_SESSION where SESSION = '<session_id>'
```
8. Click **Save**.
9. On the navigation panel, click and expand **Roles**.
You should see two predefined roles:
 - Administrator role
 - Kafka view role
10. Click **Save**.

After you complete the preceding steps, you can open your Kapplets, where the Main Navigation menu should contain the NEW DASHBOARD item. To create a new Kapplet, with a connection to the Kofax Insight Dashboards, click **NEW DASHBOARD** and specify all necessary parameters. See the **Connecting to Kofax Insight Dashboards** topic in the Kapow Help for more details.

Chapter 4

Using Kofax Analytics for Kapow

With Kofax Analytics for Kapow, you can view the data retrieved from your log database in an interactive dashboard through the [Viewer](#).

The Kofax Analytics for Kapow dashboard consists of several views included in your installation. Each view has graphical elements and other components to analyze data in your Kapow database.

Viewer

Use the Viewer to display the dashboard views included in your Kofax Analytics for Kapow installation. These views include a variety of visual and analytical representations of data using charts and tables. System administrators, business process managers, and other stakeholders use this interface to gain visibility into analytical information.

Note that Viewer data is updated every minute.

Opening the Viewer

Depending on the authentication method, the procedure for opening the Viewer may vary. Follow the procedure in this section, depending on the authentication type.

Note The recommended monitor resolution is 1280x1024.

Insight Users Authentication

Do one of the following to open the Viewer:

- Navigate to **All Programs > Altosoft > Viewer**.
- Open a web browser and enter the following URL:

`http://<server>/Insight/View/`

where <server> is the name of your server.

A login window appears. Enter valid login credentials and click **Login**.

Note Be sure to verify that the website's binding host name is set to blank or localhost in your IIS settings. Otherwise, a login error may occur.

To ensure proper viewing, verify the proper Authentication Method setting in Insight Admin. The "No authentication" setting is not supported and may produce errors or unexpected results in the browser window. For details, see [Configuring Your Project](#).

Also, if Main is not selected as the default view for the role associated with the user who is logging in, the following error may appear:

You can specify view name parameter in Admin Tool

Resolve the issue by setting Main as the default view.

Windows Users Authentication

Do one of the following to open the Viewer:

- Navigate to **All Programs > Altosoft > Viewer**.
- Open a web browser and enter the following URL:

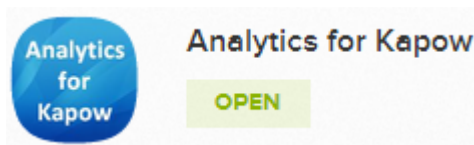
`http://<server>/Insight/View/`

where <server> is the name of your server

Be sure to verify that the website's binding host name is set to blank or localhost in your IIS settings. Otherwise, a login error may occur.

HTTP Request Authentication (SSO)

After you [set up the HTTP request authentication](#) and created a Kapplet with a connection to the Kofax Analytics for Kapow, open your Kapplets and click **Open** in the Kapplet that connects to Kofax Insight Dashboards.



See Kapow documentation for details.

Viewer Screen Layout and Navigation

Viewer

KOFAX Analytics for Kapow powered by attosoft

Welcome Studio Administrator Today is 03/12/2015

Overview Clusters **Projects** Schedules

Time period Last hour Reset Filters

Projects

Project	Scheduled	API calls	Health
Default project	16	0	

Robots

Robot	Execution time	Extracted records	KCU	Errors
Reset	00:00:00	0.00	0.00	1.00
Pivot	00:00:00	0.00	0.00	1.00
Create marker	03:24:32	736.00	9,476,019.00	0.00
Show markers	00:00:00	0.00	0.00	1.00
Zoom in	00:02:41	11.00	562,394.00	0.00
Time	00:00:00	0.00	0.00	1.00
Chart	00:00:21	0.00	21,006.00	2.00
Copy	00:00:01	0.00	10,000.00	0.00
Refresh	00:00:14	1.00	81,007.00	0.00
Info	00:00:00	0.00	0.00	1.00
Logging	00:00:00	0.00	0.00	1.00
View	00:00:00	0.00	0.00	1.00

Export to Excel Wrap Filter Active Reset Total amount: 1

Export to Excel Wrap Filter Active Reset Total amount: 15

1	Toolbar Menu Use the menu to access different views. Use additional user-level items to bookmark frequently used views and log out.
2	User Input Use the navigation ribbon to select user input options such as the time. Use Reset Filters to return the data selection to the default settings.
3	Chart and Grid Footers Additional options are available on some charts and grids. Features may include Filter and reset options, Export to Excel, or text wrap settings. Footers may also include chart or grid specific summary data such as row quantity.
4	Context Menus and Chart Options Right-click a chart or grid to access more options such as Reset, Pivot, Zoom in, View, and Metric grid format. The options vary, based on the chart type or area where you right-click. Double-click an item to open detailed view of the item.

Using the Viewer

While working with the Viewer, you can do the following:

- Click any Project, Robot, or Schedule name in the list to drill down to activity details.
- Manipulate and interact with any component on the dashboard.
- Hover over a point in a graph to view details.
- Double-click any graph name to expand it to full browser window.
- Click and drag to the side any graph name to switch to the list view and back.
- Filter the results by clicking **Filter** at the bottom of the page and specifying filtering parameters.
- Select the period for the statistics in the **Time Period** list.

Exporting to Excel

On any grid with Export to Excel functionality, you can set preferences for exporting the content of the grid to Microsoft Excel.

1. On a grid with Export to Excel enabled, click **Export to Excel**.
The Export to Excel window appears.
2. Select an **Export content** option:
 - Current page and top drill down
 - All pages of a grid. top drill down level. Could take some time.
 - All pages of a grid, all drill down levels. Could take much longer.
3. Select an **Export format** option:
 - Unformatted XML file, readable by Excel
 - Formatted Excel file
 - Unformatted CSV file
 - Unformatted TSV file
4. Optionally select **Enabled** to use a flat export, which retains granular details for drill down or expandable data.
5. Click **OK** and when prompted, save or open the .xml file.

Kofax Analytics for Kapow Views

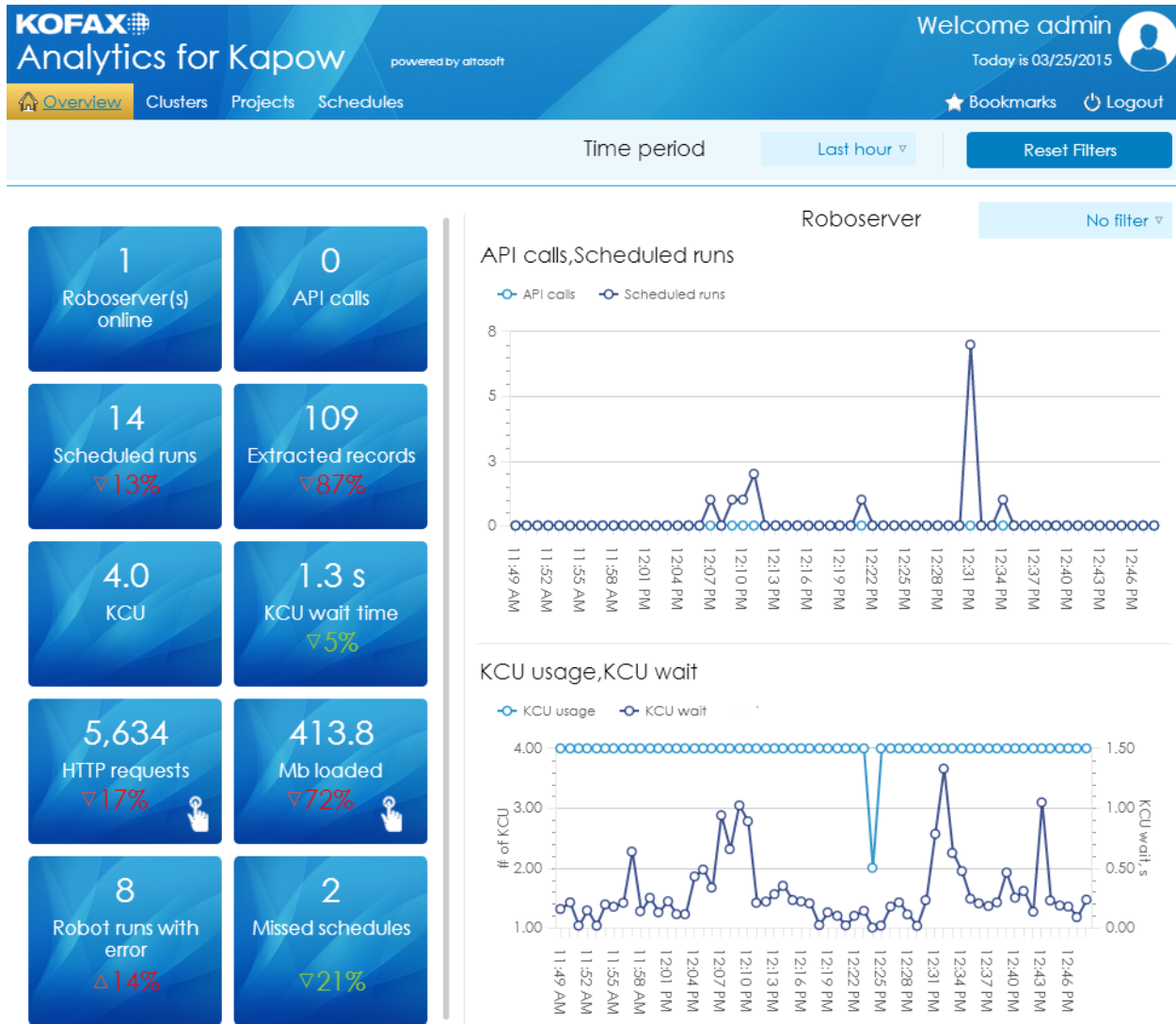
This section gives you information about each view provided in your Kofax Analytics for Kapow installation. You can interact with and manipulate different objects on the view to get detailed information.

- [Overview](#)
- [Clusters](#)
- [Projects](#)
- [Schedules](#)

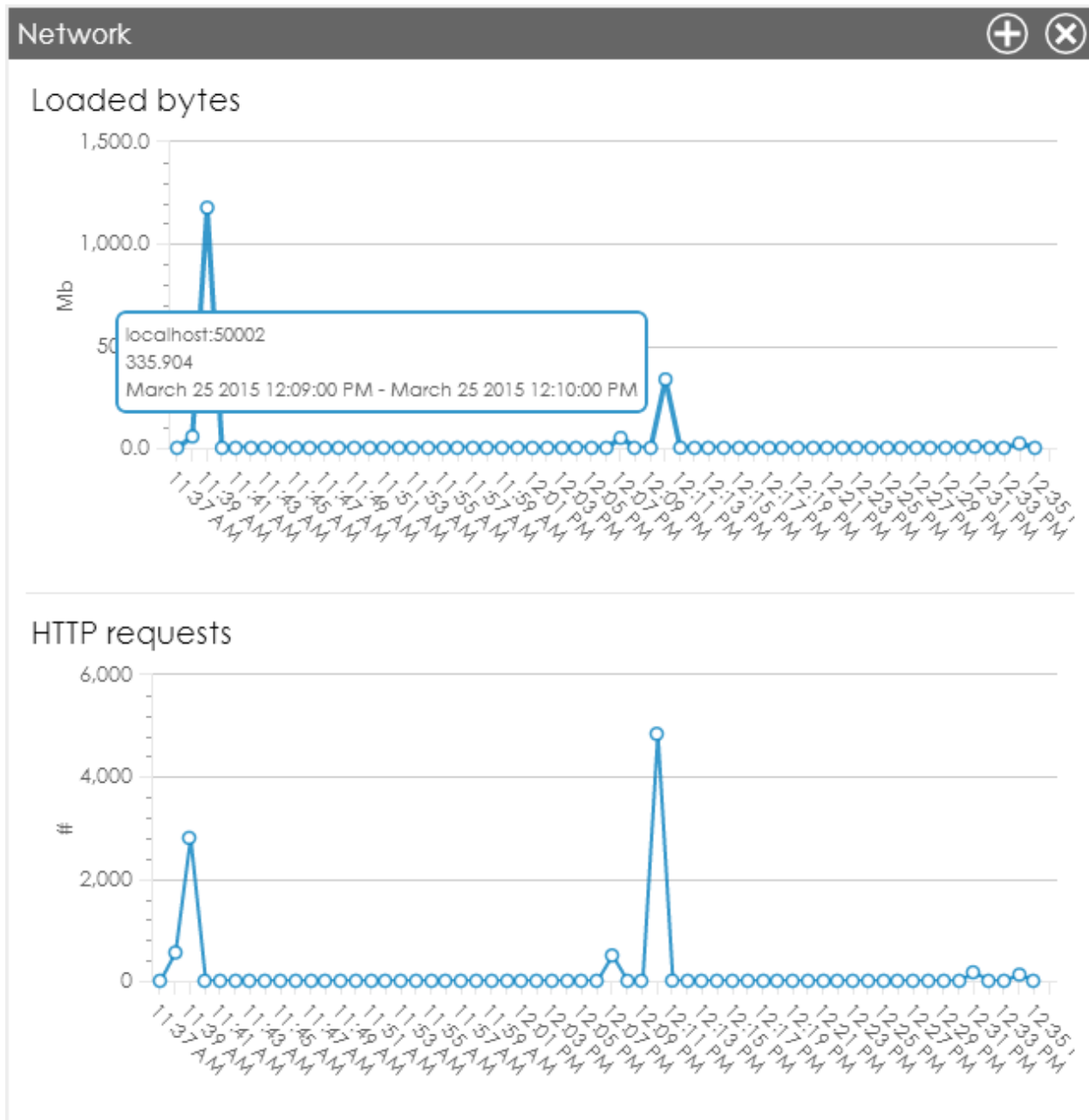
Overview

Overview view provides a graphical representation of Kapow system performance parameters, so that you can quickly see capacity bottlenecks or system utilization issues. You can filter the data by selecting a period in the **Time period** list and selecting a Roboserver in the **Roboserver** list.

Overview View



Click a tile with this symbol  to view network details as in the following figure.



KCU Health

KCU Health is calculated based on two metrics: one for API calls and one for Schedules.

The KCU health for API calls is calculated based on KCU wait time from robot runs.

- The KCU health becomes Yellow if the maximum KCU wait time for a robot run is more than one second.

- The KCU health becomes Red if the average KCU wait time for a robot run is more than one second.

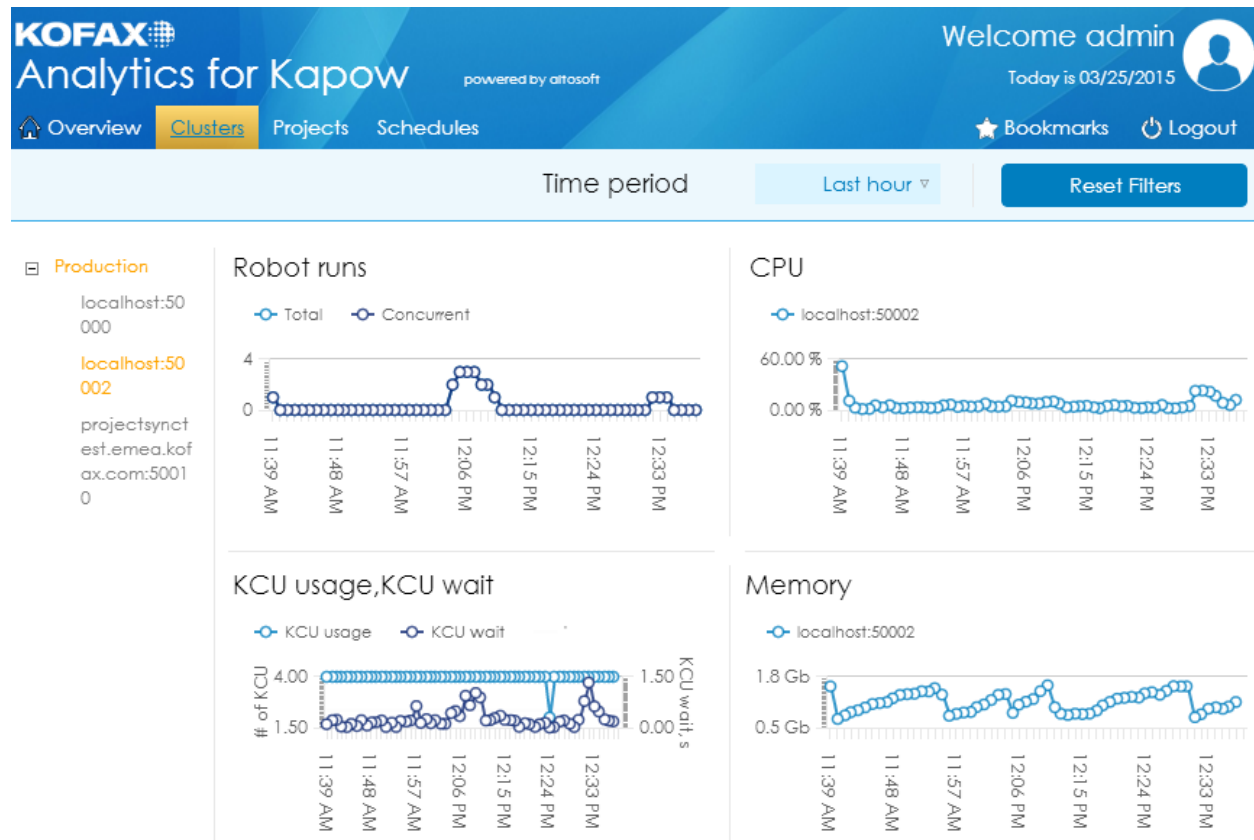
The KCU health for schedules is drawn from the statistics as follows: zero base is 2 seconds per minute, and the peak limit is 10 seconds per minute.

- The KCU health becomes Yellow if 10% of the data points have a KCU wait that exceeds the peak limit, or if 50% of the data points have a KCU wait that exceeds the zero base.
- The KCU health becomes Red if 50% of data points have KCU wait that exceeds the peak limit, or if 90% of data points have a KCU wait that exceeds the zero base.

Clusters

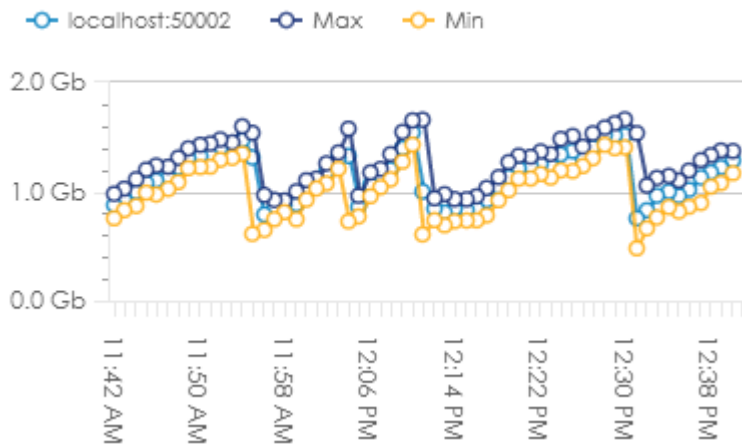
This view provides a graphical representation of Kapow system performance parameters on a cluster level. The CPU and Memory graphs show average usage for all RoboServers in a cluster.

Clusters View



You can filter the results by selecting a RoboServer in the list. When you select a RoboServer, the CPU and Memory graphs show minimum, maximum and average usage as in the following example.

Memory



Projects

This view provides an overview of robot health in your projects by displaying a graphical presentation of key robot run metrics. You can identify and fix robots that are not performing as expected.

Projects View

KOFAX
Analytics for Kapow
powered by atosoft

Welcome admin
 Today is 03/25/2015

[Overview](#)
[Clusters](#)
[Projects](#)
[Schedules](#)

[Bookmarks](#)
[Logout](#)

Time period: Last hour ▾ Reset Filters

Projects

Project	Scheduled	API calls	Health
Default project	14	0	○

Robots

Robot	Execution time	Extracted records	KCU	Errors
MJ/simon/robot/BestBuyMonitor	00:03:04	15.00	344,470.00	0.00
MJ/simon/robot/CDWMonitor	00:06:26	32.00	821,601.00	0.00
MJ/simon/robot/FacebookLikeRandom	00:00:01	0.00	0.00	1.00
MJ/simon/robot/PostTweet	00:00:08	0.00	12,038.00	1.00
MJ/simon/robot/SearchingBig	00:00:01	0.00	0.00	1.00
MJ/simon/robot/ShockPrices	00:03:08	11.00	562,408.00	0.00
MJ/simon/robot/ShockPricesKapplet	00:00:01	0.00	0.00	1.00
MJ/simon/robot/teststs/StaplesMonitor	00:05:53	51.00	551,380.00	0.00
MJ/simon/robot/ToDoMVC	00:00:26	0.00	21,006.00	2.00
robotFolder/100DkkToRmb	00:00:01	0.00	10,000.00	0.00
robotFolder/Hello there/JSONExtract	00:00:00	0.00	0.00	1.00
robotFolder/Scicomp	00:00:07	0.00	24,000.00	0.00
xlxs/AmazonMonitor	00:00:00	0.00	0.00	1.00

[Export to Excel](#)
[Wrap](#)

[Filter](#)
[Active](#)
[Reset](#)
 Total amount: 1

[Export to Excel](#)
[Wrap](#)

[Filter](#)
[Active](#)
[Reset](#)
 Total amount: 14

Robot Health

Robot health is calculated based on three values: errors count, execution time, and extracted records. For each robot run for a selected period, a mean and deviation is calculated. If all values fall into mean plus/minus deviation, the robot run is Green. Otherwise, the robot run becomes Red.

If all robot runs of a robot are Green, the robot health is Green. If some robot runs are Red, the robot health is Yellow. If all robot runs are Red, the robot health is shown as Red.

Schedules

This view provides a graphical presentation of the number of concurrent schedule runs, which offers an overview of the load distribution on your system.

Schedules View

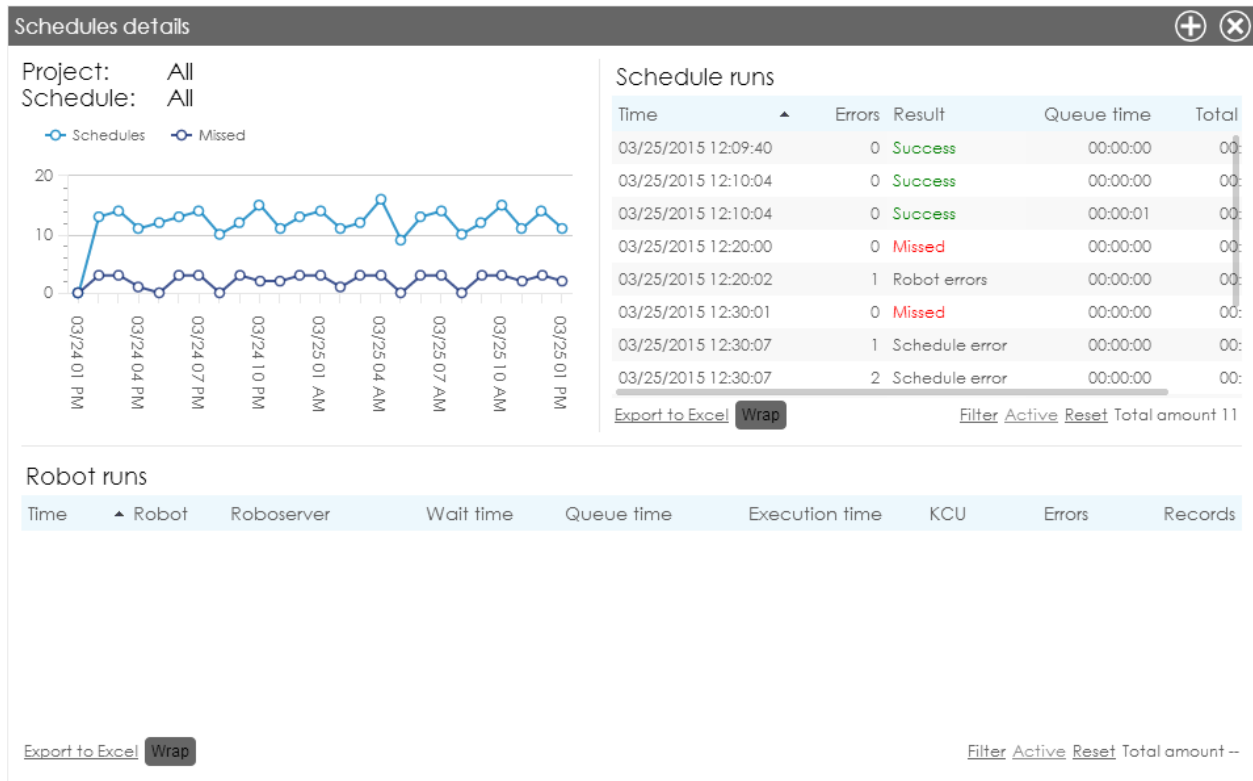
Schedules

Project	Scheduled runs	Missed	Health
Default project	11	2	Red
AcerMonitors	1	0	Red
AmazonSchedule	1	0	Green
Bicycles_with_new_type	1	1	Red
Dkk to Rmb schedule	1	0	Green
Facebook_GroupExtract	1	0	Green
popularwebsites	1	1	Red
Schedule	1	0	Green
Schedule_JSON	1	0	Green
search engines	1	0	Green
ShockPrices	1	0	Green
Trends	1	0	Green

Robots

Robot	Execution time	Extracted records	KCU	Errors
MJ/simon/robot/BestBuyMonitor	00:03:04	15.00	344,470.00	0.00
MJ/simon/robot/CDWMonitor	00:06:26	32.00	821,601.00	0.00
MJ/simon/robot/FacebookLikeRandom	00:00:01	0.00	0.00	1.00
MJ/simon/robot/PostTweet	00:00:08	0.00	12,038.00	1.00
MJ/simon/robot/SearchingBig	00:00:01	0.00	0.00	1.00
MJ/simon/robot/ShockPrices	00:03:08	11.00	562,408.00	0.00
MJ/simon/robot/ShockPricesKaplet	00:00:01	0.00	0.00	1.00
MJ/simon/robot/teststs/StaplesMonitor	00:05:53	51.00	551,380.00	0.00
MJ/simon/robot/ToDoMVC	00:00:26	0.00	21,006.00	2.00
robotFolder/100DkkToRmb	00:00:01	0.00	10,000.00	0.00
robotFolder/Hello there/JSONExtract	00:00:00	0.00	0.00	1.00
robotFolder/Scicomp	00:00:07	0.00	24,000.00	0.00
xlsx/AmazonMonitor	00:00:00	0.00	0.00	1.00

To see the details of a Schedule run, select a schedule and click **Details** in the **Schedules** pane. You should see the Schedules details window as follows:



Schedule Health

Schedule health is calculated based on three values: errors count, execution time, and extracted records. For each schedule run for a selected period, a mean and deviation is calculated. If all values fall into mean plus/minus deviation, the schedule run is Green. Otherwise the schedule run becomes Red. Each schedule health is based on runs of this schedule.

If all schedule runs of a schedule are Green, the schedule health is Green. If some schedule runs are Red, the schedule health is Yellow. If all schedule runs are Red, the schedule health is shown as Red.

Index

B

batch class list, [28](#)

D

dashboard,
 client, [14](#)
database,
 driver, [12](#)

E

export to Excel, [28](#)

G

Getting help, [5](#)

H

hardware requirements, [8](#)
Help for Kofax products, [5](#)

I

IIS,
 IIS 7, [11](#)

M

metadata repository, [12](#)

O

Oracle,
 requirements, [12](#)
 user privileges, [13](#)

P

prerequisites, [9](#)
product overview, [7](#)

R

refresh interval, [28](#)

S

servers, [8](#)
Support site, [5](#)

T

Training, [5](#)

V

Viewer,
 introduction, [25](#)
 opening, [25](#)
 screen layout, [27](#)
 using, [28](#)
views, [28](#)