Integrating Multiple Kofax Analytics Products

Kofax Analytics products, such as Kofax Analytics for Capture / KTA / SignDoc / RPA / Markview etc., all incorporate their own authentication methods for accessing their respective dashboards (i.e., their own authentication for Insight's Viewer application). These products come with their own Admin settings that will conflict with each other. The most common areas of conflict are in Authentication, Connections, Users, User Mapping, and Roles but there may be others depending on the products being imported.

For example, KAfTA utilizes KTA sessions to authenticate users. KAfRPA uses Insight authentication. Both products import Admin settings when the project is imported in the Admin application via its *<Project>_Admin.xml* file within the product zip file. If you import KAfTA first, the viewer authentication configuration (Admin | Authentication | Viewer app) will show HTTP / External Database. If you next import KAfRPA, the KAfTA authentication settings will be overwritten because RPA's analytic product uses Insight authentication.

There are two options to resolve this.

Option One: Add Additional Viewer Application Instance

To resolve this, add a second instance of the Viewer application for Insight in IIS. For details, refer to the Online Help here. This will allow you to retain both authentication schemes.

https://docshield.kofax.com/Insight/en_US/6.4.0-yznsd78sen/help/Insight_admin/Insight_adminguide/t_multipleauthenticationforms.html

Then in Admin | Authentication, configure the new Viewer application to use the required authentication method for that (in this example, this new instance will be used for KAfRPA - Insight authentication. KAfTA uses a URL comprised of session information as part of its default viewer application instance. KAfRPA will utilize the new Viewer app name created in IIS, for example, "/KAFRPA/Default.aspx".

Admin | User Mappings are also configured on a per-viewer instance like Authentication explained above.

Kofax Analytics product downloads are zip files that contain both the admin settings and the project zip file within it.

There are two methods to import projects – from Admin or from Studio. An Admin-based import configures both Admin settings and the project in a single import. A Studio-based import only imports the project.zip and will not recognize Admin.xml. Kofax Analytics products are developed for Admin-based import.

It is important to understand each product's settings in Admin application and document these settings because the second project imported will require manual configuration to avoid overwriting the first project's settings. At minimum, document the settings mentioned above (Authentication, Connection, etc.)

After identifying the overlapping settings, follow these steps to import the second project (KAfRPA in this example):

1. Extract the KAfRPA product Zip file and retrieve only the <Project>_Admin.xml file.
2. Create a new and empty project in Admin for KAfRPA (Project name and meta/data database information only).
   a. Do not use the tab, "Import from File." Instead, select "Create blank project."

3. Still in Admin application, click the Tools buttons and then "Import"
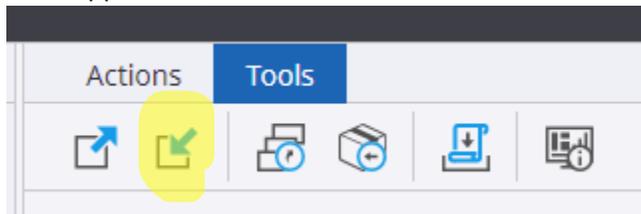
   a.
4. Select the KAFRPA_Admin.xml file.
5. **DE-SELECT** (uncheck) the items to avoid overwriting the first project's settings.
   a. Conversely, you can select the option to "Preserve Existing" in the Import UI. That will retain settings from your first project but settings from your second project will have to be manually configured.

6. Click Import to import the additional setting specific to your second project (KAFRPA).
7. Review Admin settings under each tree and for each Viewer instance (Authentication and user Mapping).

8. Close Admin.
9. Start Studio.
10. Make sure the correct project is selected in the Project drop-down (KAfRPA).
11. From Tools, select the Import icon.
12. Select the *Project_KAFRPA.zip* file to load the project now.

Option Two: Add Views from Second Project Into First

This option allows you to retain the authentication scheme and merge views from one project into another by editing the Main Menu control and adding a new menu item to retrieve views from another project.

NOTE: Prior to doing this, copy and paste the default home view and use the copy. Modify the source document could impact Analytics product updates / upgrades.

1. Grant a role access to both projects.
2. Open your main Analytics project in Studio.
3. Edit the main view (copied) by modifying the menu control (Right-click | Data|

.
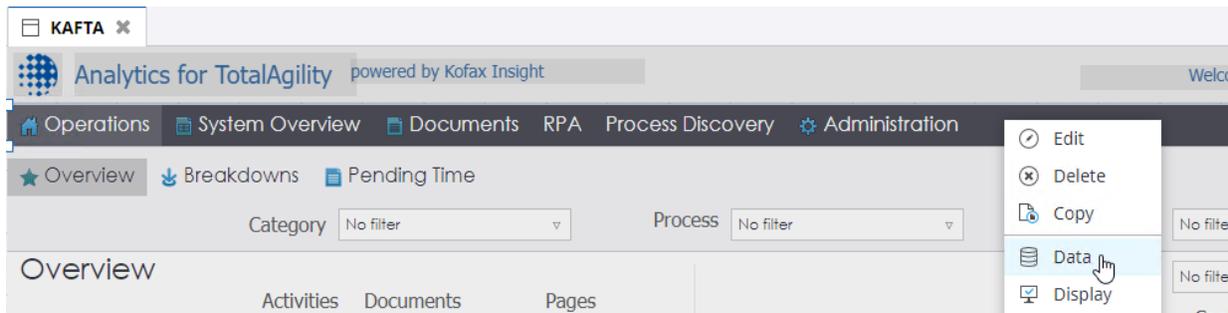
4. Add in an option for KAfRPA, as an example.

Wizards ☐ ✕

Data Display

The menu affects the View holder component: Selected Item   ▼

View holder   ▼   Name

Component label: KAfRPA

None   ▼   ☐ Icon ...

⊕ ⊗ ✚ ☆   Item Type and Options   ▼

🖥 🏠 Operations   ⦿ Menu item, execute action
📄 System Overview   None   ...
📄 Documents
RPA   ○ Dynamic list of items
Process Discovery   All views from folder:
⚙ Administration   ›
KAfRPA   ...

                                                    ○ Separator

Item Type and Options   ▼

⦿ Menu item, execute action

None 🖑   ...

8. Select the project that contains the view, then you can select the desired view to add.

Dialog

Documents tree ☐ ✖

Display view

KAFTA ▼

Disable if the group has

KAFC

View:

KAFTA

▶ 🗁 _deprecated

▶ 🗁 Administrator

▶ 🗁 BPM

▶ 🗁 Capture

▶ 🗁 Other

🗔 Insightlog

🗔 KAFTA