Kofax Monitor
Overview Guide

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KOFAX

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Chapter 1

Preface

This preface contains general purpose information about this document.

About this Guide

This guide provides a high-level overview of the Kofax Monitor 8.2.0application developed using Reveille Software technology.

Audience

The audience for this guide includes Information Technology (IT) and Business professionals desiring a general understanding of the Kofax Monitor software application.

Chapter Descriptions

Table 1 describes the contents of each chapter in this guide.

Chapter	Title	Description
1	Preface	Provides background information for using this guide and the Kofax Monitor application.
2	Introduction to Kofax Monitor	Provides a basic understanding of the components and features that make up the Kofax Monitor application.
3	What's New	Provides summary of new capabilities in Kofax Monitor 8.2.0.
4	Glossary	Provides definitions for many of the acronyms, abbreviations, and technical terms found in this guide.

Table 1 Chapter Descriptions

Getting Help for Kofax Products

Kofax Support

The **Kofax Knowledge Base** repository contains articles that are updated on a regular basis to keep you informed about Kofax products. We encourage you to use the Knowledge Base to obtain answers to your product questions.

To access the Kofax Knowledge Base, go to the **Kofax website** and select **Support** on the home page.

Note: The Kofax Knowledge Base is optimized for use with Google Chrome, Mozilla Firefox or Microsoft Edge.

The Kofax Knowledge Base provides:

- Powerful search capabilities to help you quickly locate the information you need.

Type your search terms or phrase into the **Search** box, and then click the search icon.

- Product information, configuration details and documentation, including release news.

Scroll through the Kofax Knowledge Base home page to locate a product family. Then click a product family name to view a list of related articles. Please note that some product families require a valid Kofax Portal login to view related articles.

- Access to the Kofax Customer Portal (for eligible customers).

Click the **Customer Support** link at the top of the page, and then click **Log in to the Customer Portal**.

- Access to the Kofax Partner Portal (for eligible partners).

Click the **Partner Support** link at the top of the page, and then click **Log in to the Partner Portal**.

- Access to Kofax support commitments, lifecycle policies, electronic fulfillment details, and self-service tools.

Scroll to the **General Support** section, click **Support Details**, and then select the appropriate tab.

Related Documentation

The following publications and help files are related to this guide:

- Kofax Monitor Technical Specifications
- Kofax Monitor Migration Guide
- Kofax Monitor Installation and Setup Guide
- Using the Kofax Monitor Wizards
- Kofax Monitor Admin Console Online Help
- Kofax Monitor User Console Online Help
- Kofax Monitor Release Notes

Chapter 2

Introduction to Kofax Monitor

Kofax Monitor is a graphical application monitoring solution for tracking and reporting the health of business-critical systems. Kofax Monitor, an application built for the Microsoft® Windows® 2012 R2, 2016, and 2019 operating systems operating on-premises or supported Amazon AWS, Microsoft Azure, or Google Cloud Platform (GCP) clouds, increases your ability to:

- Continuously observe your technology investment.
- Communicate business service level information through dashboards, reports, and notification processes.
- Rapidly identify application problems and process exceptions.
- Accurately deploy the proper resources to resolve problems.
- The simplicity of Kofax Monitor allows a broad audience to view and continually monitor your business-critical systems. Kofax Monitor, using an agent-less stimulation approach, can quickly observe and identify exceptions for business-critical applications and business processes.
- Kofax Monitor observes both applications and processes. For example, Kofax Monitor identifies any access issues to a server, and can test an application's ability to complete a series of steps, or exceptions within a process.
- Kofax Monitor can leverage existing monitor information and summarize in a business service level dashboard. The dashboard is viewable from client browsers, tablets, and mobile devices.

Some of the resources and processes Kofax Monitor can monitor for a Kofax environment are:

- Kofax platform server availability and service levels.
- Kofax ODBC-compliant databases such as Oracle®, SQL, and DB2®.
- Kofax Capture batch processing exceptions, queue count levels, and application throughput.
- Kofax Analytics for Capture status, currency, and processing.
- Kofax Transformation Modules queue count levels, application throughput, and field accuracy percentages.
- Kofax Virtual ReScan workstations scanning throughput and operating metrics.
- Kofax Communication Server processing exceptions, operating health, and message throughput.
- Kofax Import Connector web services, operation and processing.
- Kofax Reporting operation and processing.
- Kofax remote site(s) status, currency, and processing.
- Kofax TotalAgility status, currency, and processing.
- Import connector for email using Email servers such as Exchange or SMTP/POP.
- Windows Servers and Windows GUI applications.

By monitoring these resources, Kofax Monitor detects the following:

- Status of application resources and business processes from the application user perspective.
- Process exceptions using threshold comparisons and network connectivity issues.
- Malfunctions in applications running on many computer platforms.

- Service Level Agreement (SLA) violations.

Kofax Monitor

The Kofax Monitor helps you create monitors for the Kofax environment to:

- Manage the uptime/availability of the Kofax Capture system, Kofax Analytics for Capture application, Kofax TotalAgility system, Kofax Transformation Modules application, Kofax Communication Server system, Kofax Front Office Server system, Kofax Import Connector, Kofax Reporting, and Kofax Virtual ReScan deployments.
- Understand Kofax document processing levels.
- Allow collection of SLA metrics.
- Isolate or resolve problems quickly.

Kofax Capture, formerly *Ascent Capture*, accelerates business processes by collecting documents and forms, transforming them into accurate, retrievable information, and delivering it all into your business applications and databases. Whether your information is on paper or in electronic files, whether it is parked at a central office or scattered on desktops and remote offices throughout the world, *Kofax Capture* can help you capture it all quickly and accurately. *Kofax Analytics for Capture* provides optimized out-of-the-box dashboards focused on elevating visibility and operating performance. It delivers interactive views of operating performance and productivity metrics to better enable administrators to report on the effectiveness of their capture solution as well as valuable information to improve overall capture throughput.

Kofax TotalAgility is a unified software platform that dramatically transforms and simplifies the business critical First Mile™ of business. The First Mile represents information-intensive interactions a customer, provider or partner has with an organization — interactions like new customer onboarding, claims processing, patient experience, student transcript processing and citizen services. By making these meaningful interactions fast, simple and accurate, TotalAgility sets the stage for enduring and profitable customer relationships. TotalAgility delivers a friction-free First Mile, enabling mutually beneficial engagements throughout a business process and over an entire customer lifecycle. The result is sustainable competitive advantage, continually reduced operating costs and satisfied, loyal customers.

Kofax Transformation Modules streamline the transformation of business documents into structured electronic information by automating the process of document classification and data extraction. Using learn-by-example techniques for document classification, separation and extraction, solutions can be configured and optimized quickly and cheaply. Wherever incoming documents drive transactions, organizations will benefit from reduced operating costs, increased productivity, better data quality and improved compliance. *Kofax Transformation Modules* are the most complete and versatile document transformation offering on the market, processing hand-printed and handwritten forms, invoices, checks, correspondence and any other document type on a single platform. Kofax Transformation Modules also integrate seamlessly with Kofax Capture, giving access to the widest range of document scanners and back-end storage solutions, and benefiting from its distributed capture, high availability and enterprise capabilities.

Kofax Front Office Server enables documents from a variety of sources, including multifunction peripherals (MFPs), to be delivered to Kofax Capture. From Kofax Capture, you can send the documents to a variety of content management systems and email and fax servers. Kofax Front Office Server must be installed with Kofax Capture. You can use Kofax Front Office Server in a number of configurations supported by Kofax Capture, including a single server, a load-balanced cluster of multiple servers for maximum scalability and availability, or a distributed processing configuration.

Kofax Import Connector is an add-on to Kofax Capture responsible for importing messages and files in many electronic formats. Kofax Import Connector can import messages and files from many sources:

- Email messages including attachments using various email protocols (SMTP, POP3, IMAP)
- Fax messages (through internal fax over IP server or external fax servers: Kofax Communication Server, RightFax, Biscom)
- Files from a network path
- Files through web services

Kofax Reporting gives system administrators, business process managers, and other stakeholders important information about Kofax-managed business processes. The product serves as the single conduit across many Kofax products, providing centralized storage of historical operational metrics and audit data.

Visit **www.kofax.com** for more information.

Kofax Monitor Basics

The following sections provide a high-level description of the Kofax Monitor application.

How Kofax Monitor Works

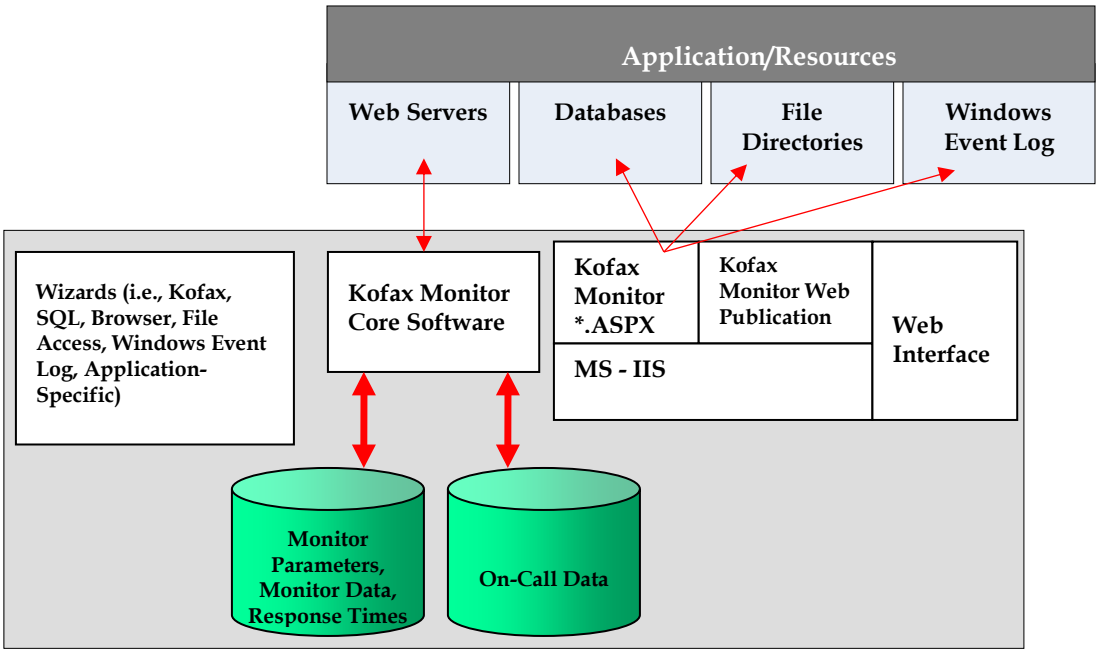
Kofax Monitor uses the HTTP and HTTPS protocols to test target applications, known as Resources. Consequently, Kofax Monitor can access Web applications directly for monitoring.

Note If your application uses a protocol other than HTTP or HTTPS, you need a Web application server (e.g., ASPX, ASP) to convert the HTTP or HTTPS protocol to the native protocol of the application. Kofax Monitor provides many of these protocol converters within the product package.

Kofax Monitor includes wizards; which assist in creating Monitors, which support most of the major networking and transport protocols. By using wizards, Kofax Monitor defines the Monitor by recording the events a user would perform when exercising the target application. These events are captured in scripts and are described as Tests. Tests are contained within Resources.

Additionally, these wizards may use prepackaged active server pages (ASPXs) or may create new ASPXs, which exercise the target application. You have the capability to modify the existing ASPXs or generate your own ASPXs, using any supported ASP.NET functionality, to meet your specific requirements.

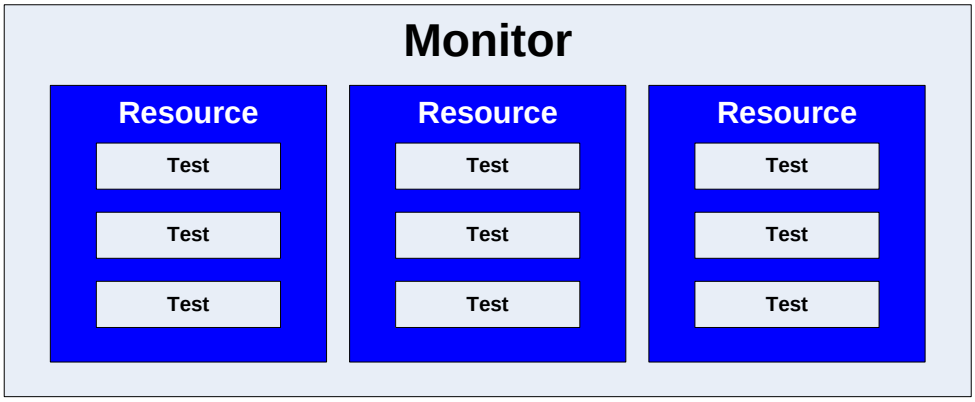
After the Resources and associated scripts are defined, the Monitor is ready for use. The Monitor data is collected in one of Kofax Monitor's databases and the resulting reports and analysis are accessible through the Web-based Kofax Monitor User Console. A second database is used to maintain the on-call schedule data for each Test. See Kofax Monitor User Console on page 17, and the *Kofax Monitor User Console Online Help* for more information. Kofax Monitor's high-level architecture is shown below.



Kofax Monitor High-Level Architecture

Kofax Monitor Terminology

To understand Kofax Monitor, you need to understand the key terms as shown in the diagram.



Key Terms in Kofax Monitor

Monitors

A *Monitor* is a group of Resources making up an overall system Test. Monitors define:

- How Kofax Monitor is to test a system.
- What constitutes an error in testing.
- How technical support personnel are notified if an error occurs.

Monitors are represented graphically in Kofax Monitor using application diagrams. See *Application Diagrams* below for more information.

Resources

A *Resource* is a group of Tests which test a specific part of a system or application. It contains a group of one or more Tests. Within a system, Resources can test a server, Web site, network, system application, etc.

A Resource relationship defines the logical, not physical, relationship between two or more Resources within a Monitor. A Monitor contains one or more Resource relationships. When you build a Monitor in Kofax Monitor, you specify the Resource relationships making up the Monitor to be tested.

Tests

Groups of *Tests* are the granular steps making up the Resource. Tests contain the instructions to test a specific process in a system. They are set up in a way where a correct response or action is defined.

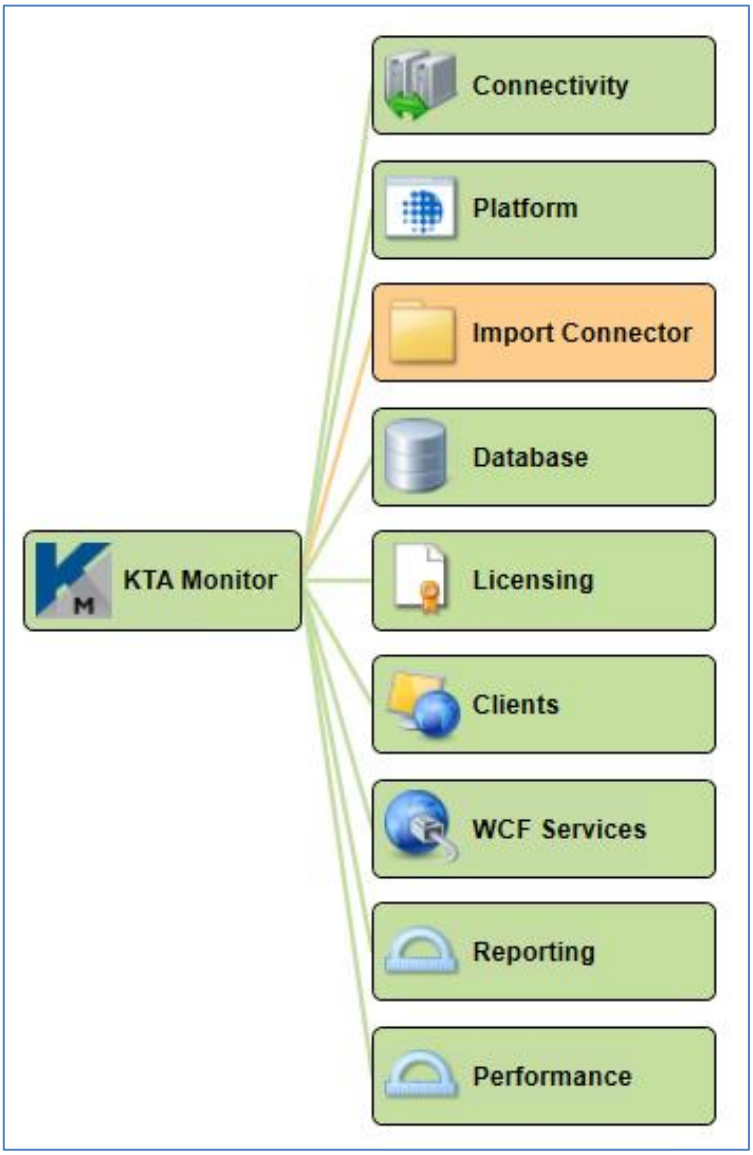
When the Test is executed by the Resource and the correct response or action is found, the Resource is considered to be functioning properly. If the correct response or action is not found, the Test fails and the Resource is not considered to be functioning properly.

Tests are executed in the order in which they are displayed on the application diagram.

See Application Diagrams in the next section for more information about Tests.

Application Diagrams

To depict monitors graphically, Kofax Monitor consistently uses a tool called an *application diagram*. The following is an example of an application diagram.



Application Diagram

The boxes represent Resources included in the Monitor. Lines from one box to another indicate a Resource relationship in which the two Resources are connected in some way. Resources are tested in the order of the relationships, from left to right, then top to bottom.

Colors in the application diagram indicate the status of Resources from when the Monitor last ran. This table defines the default Resource color codes. They can be changed to different colors as desired.

If the color is…	Then the Resource is…
Disabled	Currently disabled so that it is not tested. [Status = Disabled] **Note**: All current errors are colored either peach or orange depending on how critical.
Not Tested	Currently not being tested. Usually, the Resource is not being tested because an error has occurred on a related Resource, or because the Resource has not been scheduled for testing. [Status = Not Tested]
Testing	Currently being tested. [Status = Testing]
Good	Operating correctly. [Status = Good]
Warning	Experiencing an error designated not critical, and the test continues. [Status = Warning] **Note:** The color does not progress from yellow to red.
Bad	Experiencing an error that has been designated critical. The Resource will not be able to complete any dependent tasks until the error is corrected. [Status = Bad]
Severity 4	Experiencing an error that has been designated as Severity 4. The Resource will not be able to complete any dependent tasks until the error is corrected. [Status = Severity 4]
Severity 3	Experiencing an error that has been designated as Severity 3. The Resource will not be able to complete any dependent tasks until the error is corrected. [Status = Severity 3]
Severity 2	Experiencing an error that has been designated as Severity 2. The Resource will not be able to complete any dependent tasks until the error is corrected. [Status = Severity 2]
Severity 1	Experiencing an error that has been designated as Severity 1. The Resource will not be able to complete any dependent tasks until the error is corrected. [Status = Severity 1]

Resource Color Status

See the *Kofax Monitor Admin Console Online Help* for more information about application diagrams.

Kofax Monitor Components

Kofax Monitor consists of two main components:

- Kofax Monitor Admin Console
- Kofax Monitor User Console

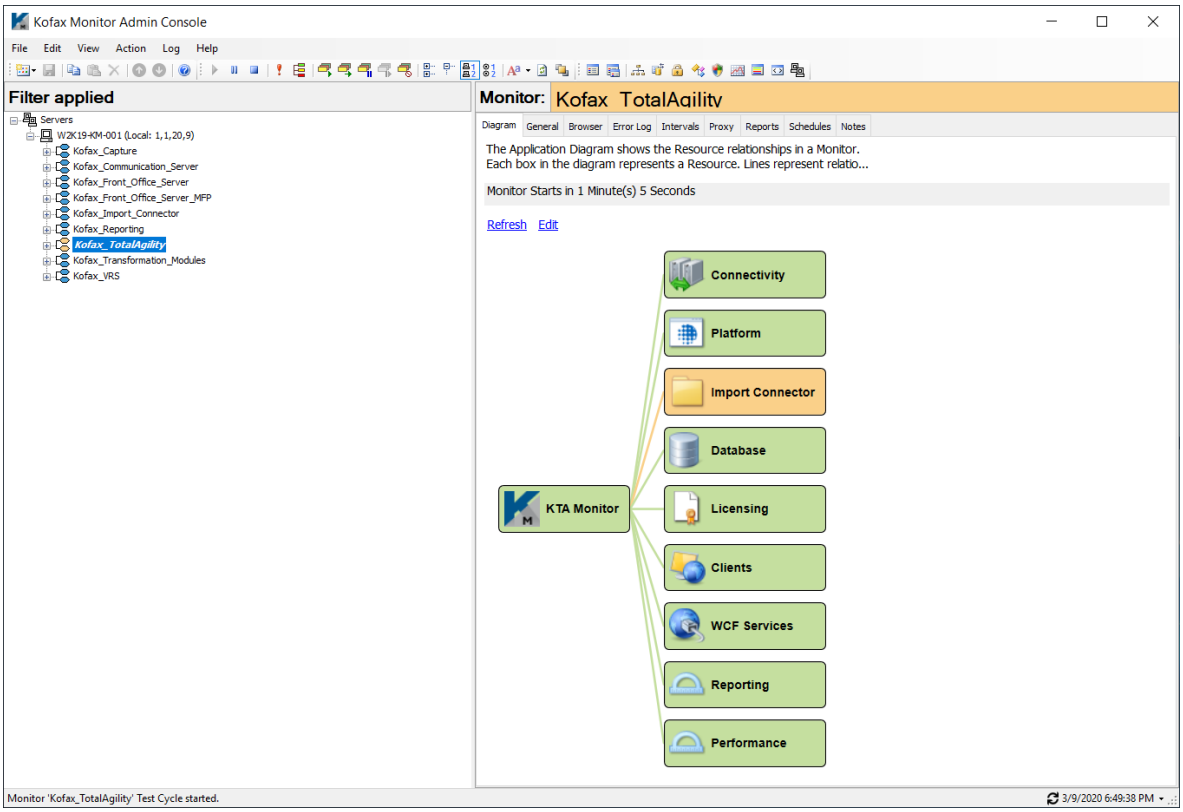
And several Kofax Monitor client access options:

- PC Browser
- Mobile Browser access by tablet and mobile devices

Kofax Monitor Admin Console

The *Kofax Monitor Admin Console* is a Windows-based application enabling you to perform system administrative tasks such as:

- Starting and stopping Monitors.
- Creating and maintaining Monitors.
- Running maintenance checks.
- Setting user and group permissions and security levels.

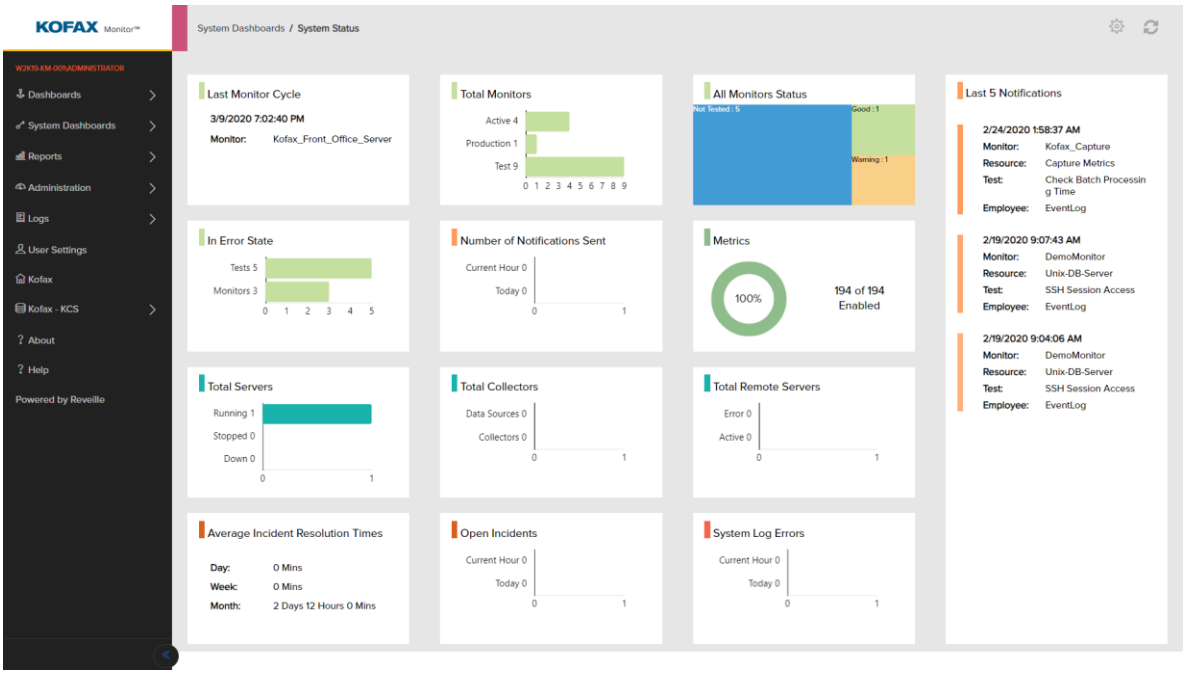


Kofax Monitor Admin Console

See the *Kofax Monitor Admin Console Online Help* for more information on the Kofax Monitor Admin Console.

Kofax Monitor User Console

The *Kofax Monitor User Console* is a Web-based application providing detailed information about Monitors in the system such as Monitor results (response times and error messages) and summary reports. The User Console also lets you maintain on-call schedules and notifications.

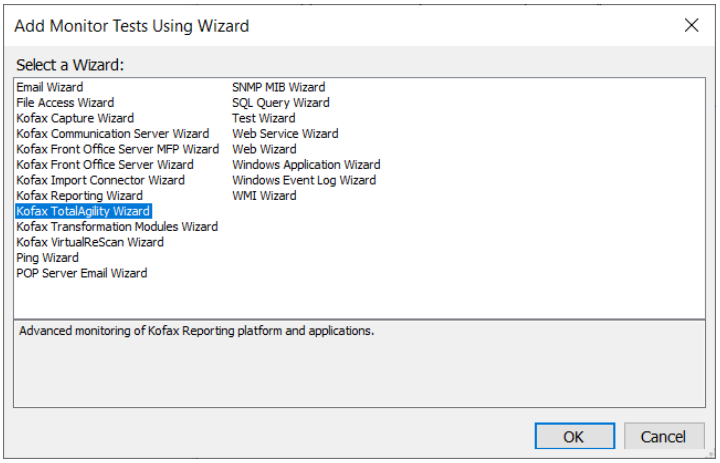


Kofax Monitor User Console

See the *Kofax Monitor User Console Online Help* for more information on the Kofax Monitor User Console.

The Kofax Monitor Wizard Set

Kofax Monitor automates Monitor development by providing a number of supplied wizards. This section describes each of the available Kofax Monitor wizards.



Add Monitor Tests Using Wizard

File Access Wizard

The File Access Wizard lets you create tests for file and directory attributes for Windows shares and FTP/SFTP locations. A Monitor can check if a file or folder exists, evaluate file properties (such as creation date, last modified date, and size), parse text file contents, and check for file presence within a specific time period.

IMAP Server Email Wizard

The Internet Message Access Protocol (IMAP) Server Email Wizard enables you to test the functionality of an Exchange email server by specifying a server name and e-mail address over an SSL/TLS connection.

A Monitor sends an e-mail message to the desired exchange mailbox. If the e-mail message is successfully sent, Kofax Monitor deletes the message from the Inbox and repeats the process as specified in the Monitor. Additional tests can open inbox folders, count items, and offer other capabilities.

Web Wizard

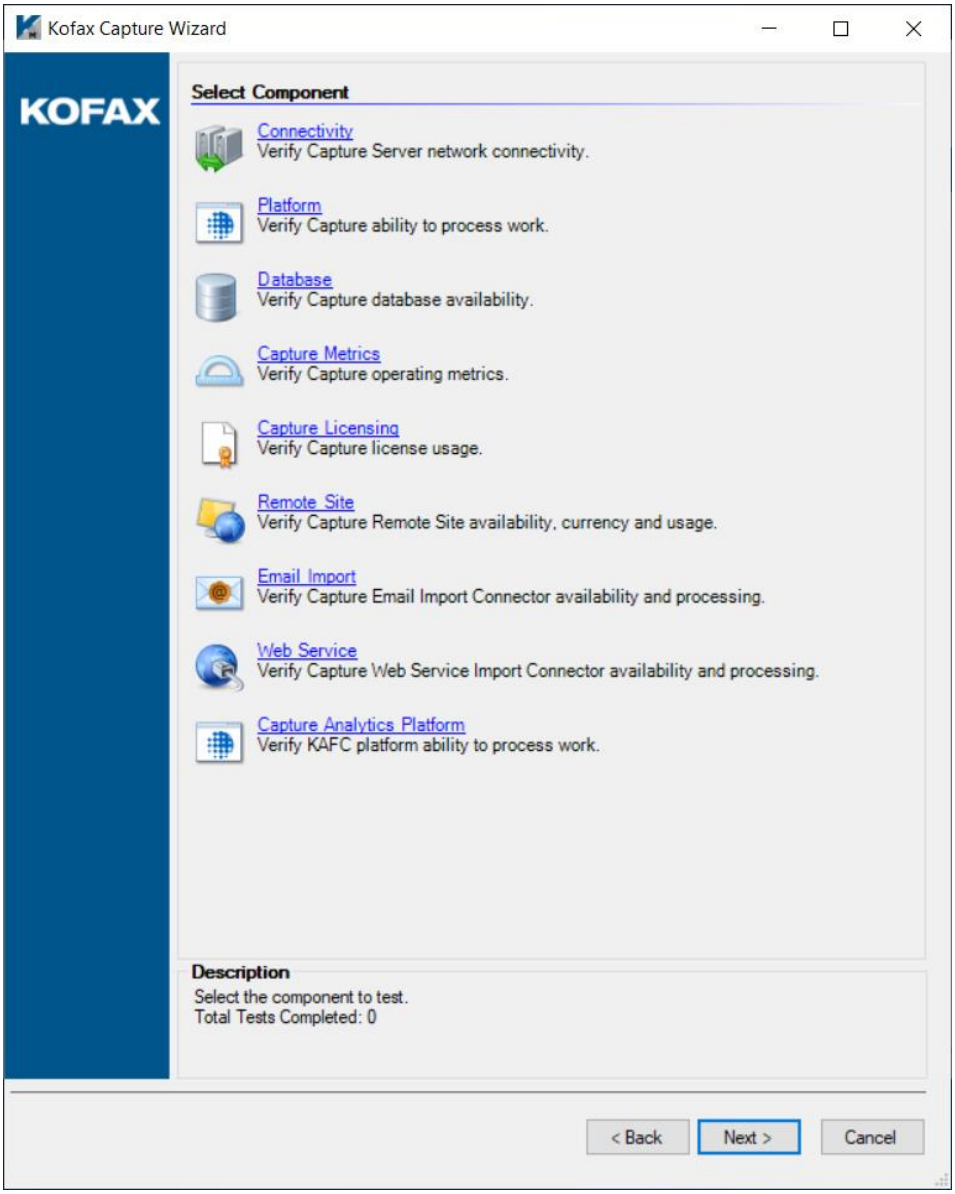
The Internet (IE) Explorer Wizard is used to create Monitor tests that can:

- Test a Java Swing Applet
- Test a Web site

The IE Wizard provides several options facilitating the testing of Web sites, including the ability to specify user credentials, use of a proxy server, the ability to ignore popup windows, the ability to run a Test before adding it to a Monitor, the use of Session Variables, importing an HTTP Archive file (HAR), and many other flexible options.

Kofax Capture Wizard

The Kofax Capture Wizard enables you to rapidly build a Kofax Monitor for a Kofax Capture or Ascent Platform.



The Kofax Capture Wizard Selection Dialog

The common resources and processes Kofax Monitor can monitor for a Kofax Capture environment are:

- Kofax platform server's availability and service levels.
- Kofax ODBC-compliant databases such as Oracle®, SQL, and DB2®.
- Import connector web services-based interfaces as part of an SOA architecture.
- Kofax batch processing exceptions, queue count levels, and application throughput.
- Kofax license server availability, page volumes and station usage.
- Kofax remote site (s) status, currency, and processing.

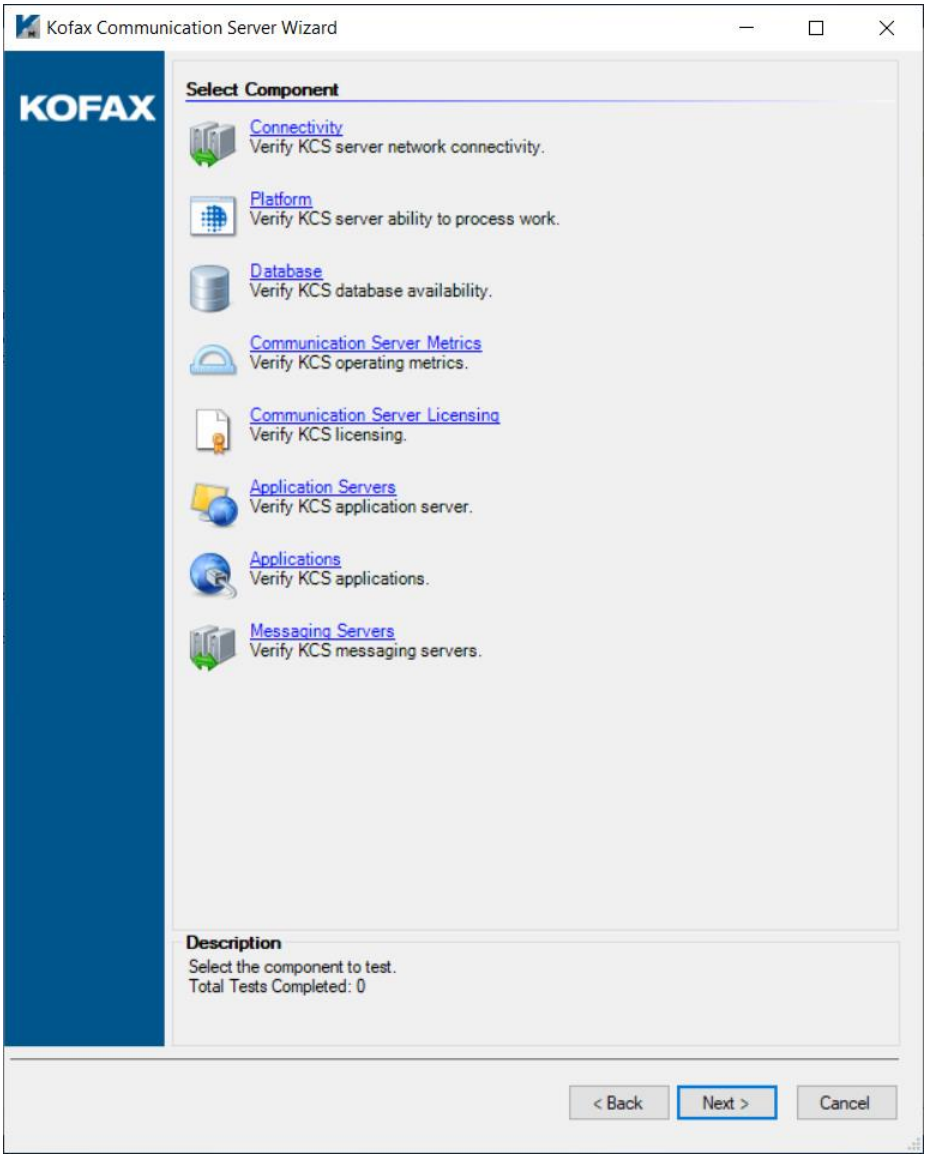
- Kofax Analytics for Capture status, currency, and processing.
- Import connector for email using Email servers such as Exchange or SMTP/POP.
- Windows Servers and Windows GUI applications.

By monitoring these resources, the resulting Kofax Monitor detects the following:

- Status of application resources and business processes from the application user perspective.
- Process exceptions using threshold comparisons and network connectivity issues.
- Malfunctions in applications running on many computer platforms.
- Service Level Agreement (SLA) violations.

Kofax Communication Server Wizard

The Kofax Communication Server Wizard enables you to rapidly build a Kofax Monitor for a Kofax Communication Server Platform.



The Kofax Communications Server Wizard Selection Dialog

The common resources and processes Kofax Monitor can monitor for a Kofax Communication Server (KCS) environment are:

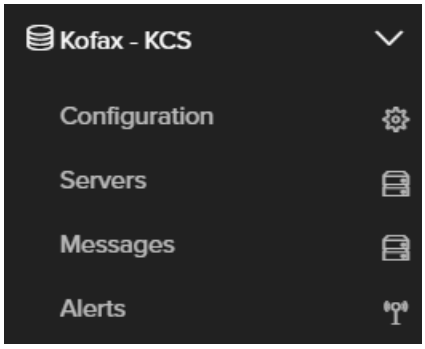
- KCS platform server's availability and service levels.
- KCS statistics and reporting databases.
- KCS processing exceptions, queue count levels, and application throughput.
- KCS license server registrations.
- KCS application status and messaging rates.
- KCS messaging server health and operations.

By monitoring these resources, the resulting Kofax Monitor detects the following:

- Status of application resources and business processes from the application user perspective.
- Process exceptions using threshold comparisons and network connectivity issues.
- Malfunctions in applications running on many computer platforms.
- Service Level Agreement (SLA) violations.

Kofax Communication Server Administration

Browser based KCS administration capabilities to manage KCS servers.



Kofax Front Office Server Wizard

The Kofax Front Office Server Wizard enables you to rapidly build a Kofax Monitor for a Kofax Front Office Server Platform.

The Kofax Front Office Server Wizard Selection Dialog

The common resources and processes Kofax Monitor can monitor for a Kofax Front Office Server (KFS) environment are:

- KFS platform server's availability and service levels.
- KFS database.
- KFS processing exceptions, queue count levels, and application throughput.
- KFS MFP processing.
- KFS User Inbox processing.

By monitoring these resources, the resulting Kofax Monitor detects the following:

- Status of application resources and business processes from the application user perspective.
- Process exceptions using threshold comparisons and network connectivity issues.
- Malfunctions in applications running on many computer platforms.
- Service Level Agreement (SLA) violations.

Kofax Front Office Server MFP Wizard

The Kofax Front Office Server MFP Wizard enables you to rapidly build Kofax Monitor for Kofax Front Office Server MFP devices.

The Kofax Front Office Server MFP Wizard Selection Dialog

The common resources and processes Kofax Monitor can monitor for Kofax Front Office Server (KFS) MFP devices are:

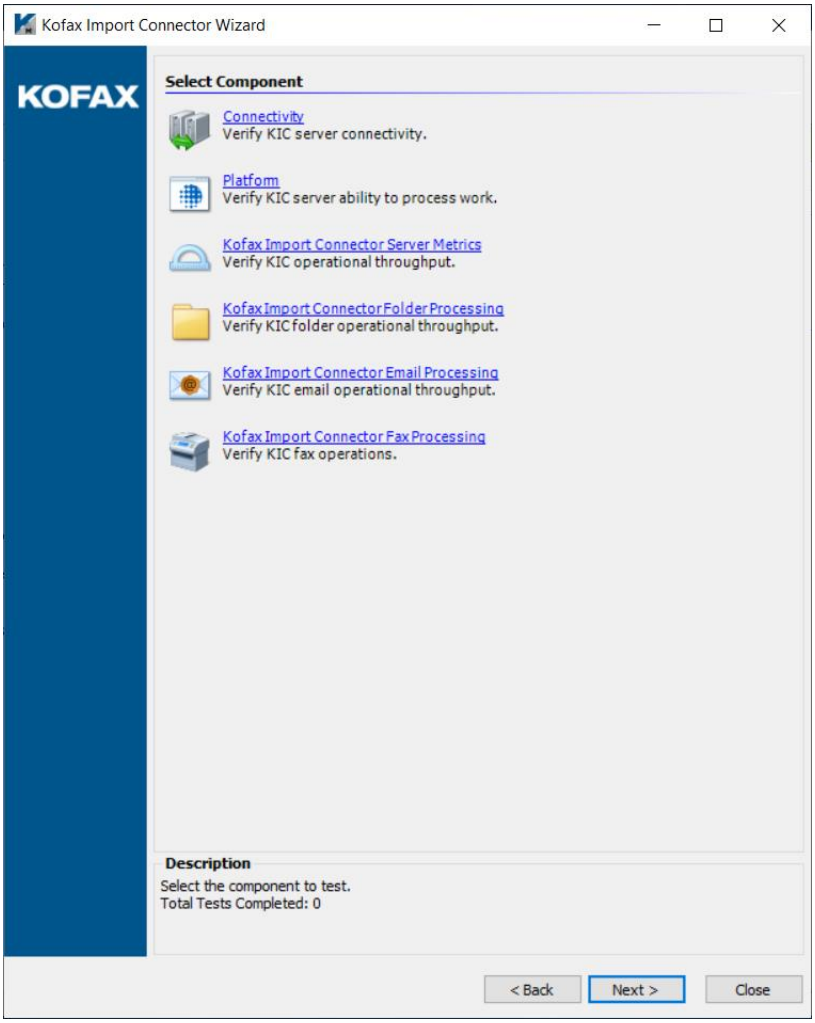
- MFP device availability and status.
- MFP device specific conditions.

By monitoring these resources, the resulting Kofax Monitor detects the following:

- Status of MFP devices.
- Process exceptions using threshold comparisons and network connectivity issues.
- Malfunctions in applications running on many computer platforms.
- Service Level Agreement (SLA) violations.

Kofax Import Connector Wizard

The Kofax Import Connector Wizard enables you to rapidly build a Kofax Monitor for a Kofax Import Connector environment.



The Kofax Import Connector Wizard Selection Dialog

The common resources and processes Kofax Monitor can monitor for a Kofax Import Connector (KIC) environment are:

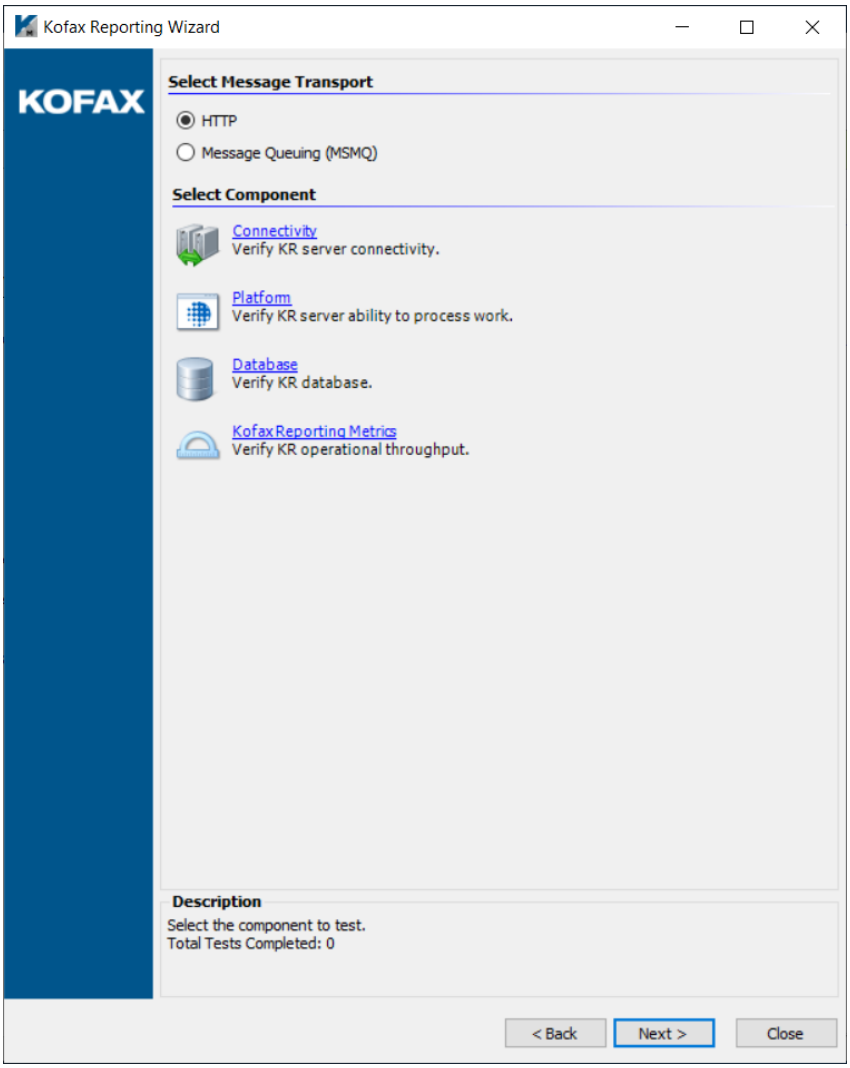
- KIC platform availability and service levels.
- KIC processing exceptions and queue levels.
- KIC folder processing.
- KIC email processing.
- KIC FOIP operations.

By monitoring these resources, the resulting Kofax Monitor detects the following:

- Understand Kofax Import Connector processing and exception levels.
- Process exceptions using threshold comparisons and network connectivity issues.
- Malfunctions in applications running on many computer platforms.
- Service Level Agreement (SLA) violations.

Kofax Reporting Wizard

The Kofax Reporting Wizard enables you to rapidly build a Kofax Monitor for a Kofax Reporting environment.



The Kofax Reporting Wizard Selection Dialog

The common resources and processes Kofax Monitor can monitor for a Kofax Reporting (KR) environment are:

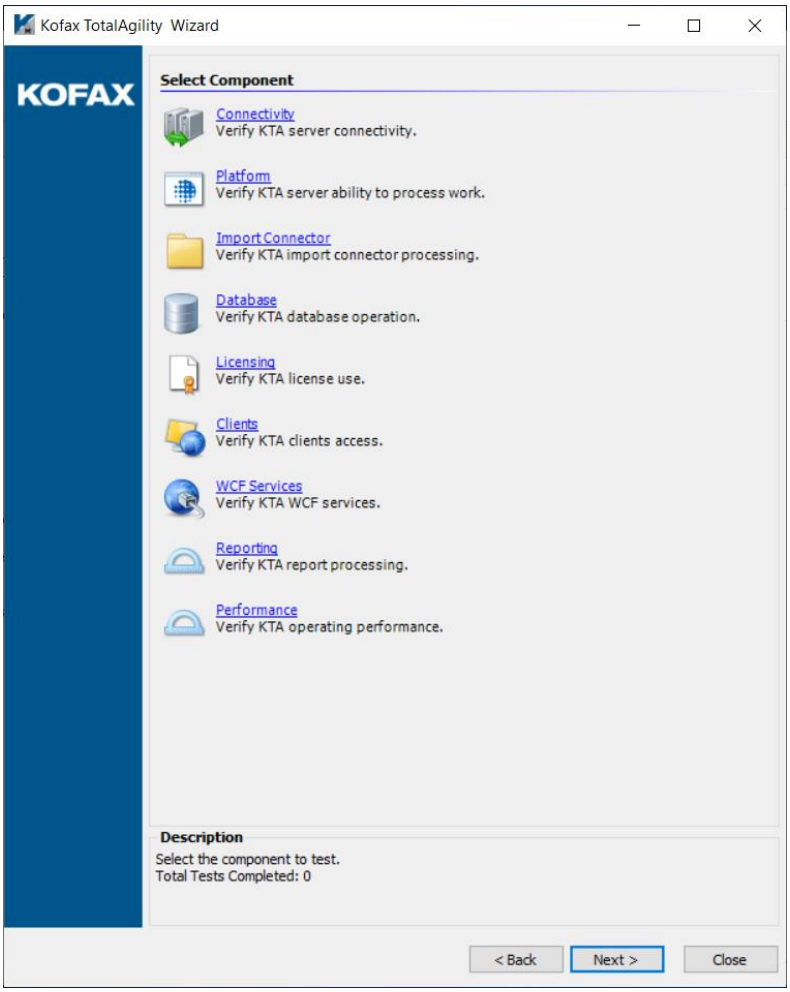
- KR platform availability and service levels.
- KR processing exceptions and queue levels.
- KR MSMQ processing.
- KR database operation.

By monitoring these resources, the resulting Kofax Monitor detects the following:

- Kofax Reporting processing and exception levels.
- Process exceptions using threshold comparisons and network connectivity issues.
- Malfunctions in applications running on many computer platforms.
- Service Level Agreement (SLA) violations.

Kofax TotalAgility Wizard

The Kofax TotalAgility Wizard enables you to rapidly build a Monitor for a Kofax TotalAgility Platform.



The Kofax TotalAgility Wizard Selection Dialog

The common resources and processes Kofax Monitor can monitor for a Kofax Transformation Modules (KTA) environment are:

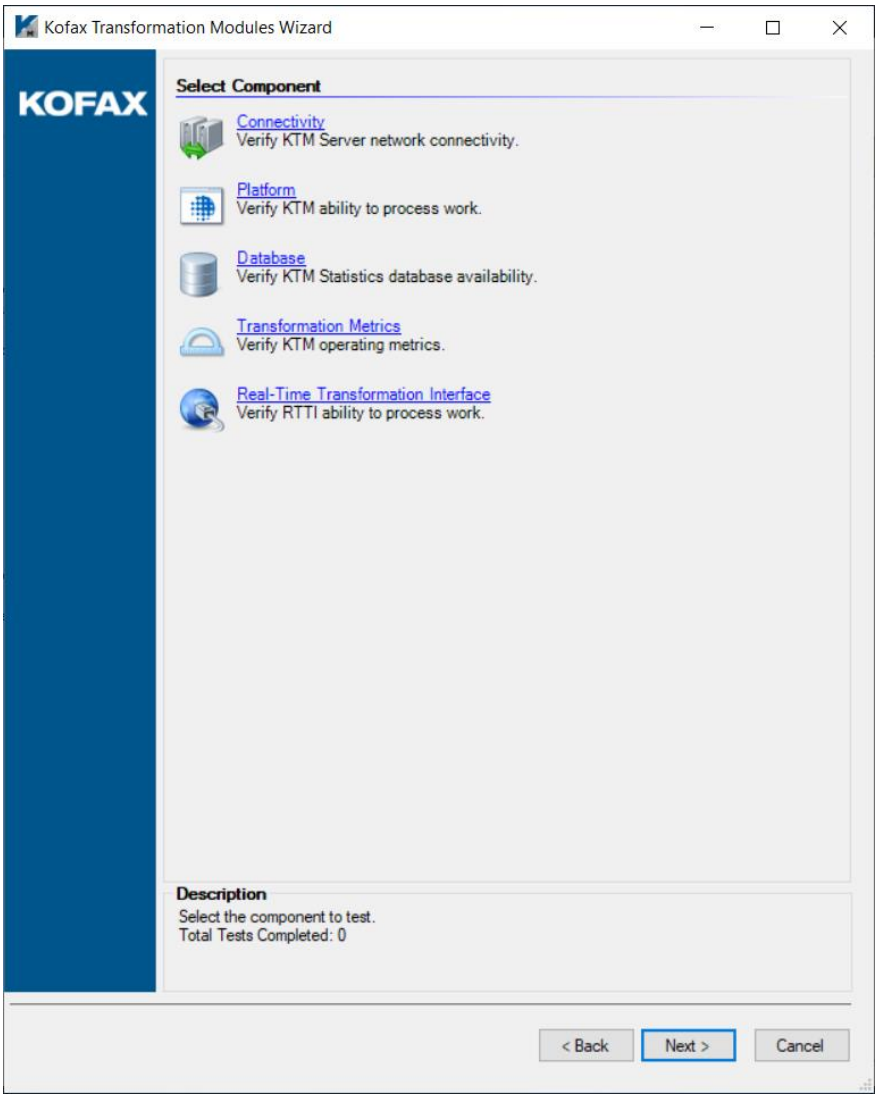
- KTA platform server's availability and service levels.
- KTA database status, currency, and growth.
- KTA import connector status, processing, and exceptions.
- KTA license usage.
- KTA client access.
- KTA WCF service call status.
- KTA report processing.

By monitoring these resources, the resulting Kofax Monitor detects the following:

- Status of application resources and business processes from the application user perspective.
- Process exceptions using threshold comparisons and network connectivity issues.
- Malfunctions in applications running on many computer platforms.
- Service Level Agreement (SLA) violations.

Kofax Transformation Modules Wizard

The Kofax Transformation Modules Wizard enables you to rapidly build a Monitor for a Kofax Transformation Modules Platform.



The Kofax Transformation Modules Wizard Selection Dialog

The common resources and processes Kofax Monitor can monitor for a Kofax Transformation Modules (KTM) environment are:

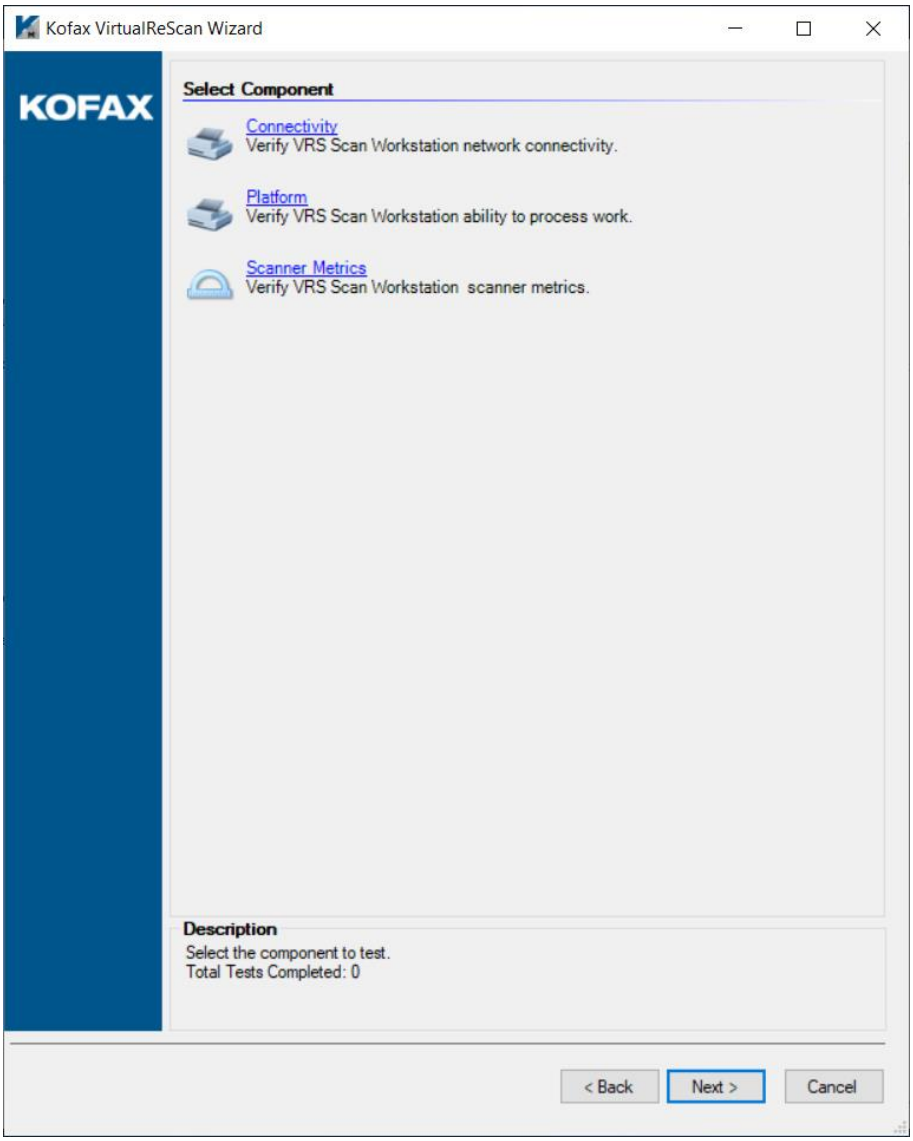
- KTM platform server's availability and service levels.
- KTM Transformation Modules statistic databases.
- KTM queue count levels, application throughput, and field accuracy percentages.
- KTM RTTI interface access, exceptions, and processing status.

By monitoring these resources, the resulting Kofax Monitor detects the following:

- Status of application resources and business processes from the application user perspective.
- Process exceptions using threshold comparisons and network connectivity issues.
- Malfunctions in applications running on many computer platforms.
- Service Level Agreement (SLA) violations.

Kofax VirtualReScan Wizard

The Kofax VirtualReScan Wizard enables you to rapidly build a Kofax Monitor for a Kofax VirtualReScan scanning workstation.



The Kofax VirtualReScan Wizard Selection Dialog

The common resources and processes Kofax Monitor can monitor for a Kofax VirtualReScan (VRS) environment are:

- VRS scanning workstations availability and service levels.
- VRS scanning workstation exceptions and configuration.
- VRS scanning workstation throughput.

By monitoring these resources, the resulting Kofax Monitor detects the following:

- Scanner throughput changes.
- Scanner operating exceptions and connectivity issues.
- Scanner machine level configuration changes.
- Service Level Agreement (SLA) violations.

Ping Wizard

The Ping Wizard helps you add a Test to determine if a host is responding properly to an ICMP ping test.

POP Server Email Wizard

The POP Server Email Wizard enables you to test the functionality of a Post Office Protocol (POP) e-mail server and Simple Mail Transfer Protocol (SMTP) server by specifying a server name and e-mail address.

A Monitor sends an e-mail message to the POP server. If the e-mail message is successfully sent, Kofax Monitor deletes the message from the Inbox and repeats the process as specified in the Monitor.

SNMP MIB Wizard

The Get SNMP MIB Wizard enables you to add one or more Resources and Tests that gathers information from an SNMP Agent responding to SNMP requests. Any exposed MIB (Management Information Base) tree structure value can be retrieved for use in a Monitor

SQL Query Wizard

The SQL Query Wizard allows one to 'build' a Structured Query Language (SQL) statement, use an existing SQL statement, or execute a Stored Procedure to query information from a Microsoft Open Database Connectivity (ODBC) Data Source. The SQL Query wizard enables you to create one or more Tests in a Kofax Monitor.

The SQL Query Wizard lets you select an existing stored procedure, and then lets you create a Test based on the results of executing the stored procedure against your data source. The Test passes if the return value of the stored procedure matches your Test condition.

Test Wizard

The Test Wizard adds one or more Resources and Tests to a Monitor, which allows you to define your own categories, tests, and entry forms via xml configuration files. The wizard can be used just like any other wizard to create monitors or add tests to existing resources. The wizard includes support for:

- AWS S3
- Azure Blob
- Google Cloud Storage
- Docker Containers
- Microsoft 365
- OneDrive
- Web Pages
- Windows Servers

Web Service Wizard

The Web Service Wizard allows you to test the methods of a web service by invoking the method and checking the returned results. The wizard interrogates the web service using WSDL (Web Service Description Language) to determine the methods available and their parameters.

The Web Service Wizard uses the WSDL (obtained via HTTP) to create a proxy. Once it has the WSDL, the proxy is created using .NET calls to import the SOAP and dynamically generate code. The arguments to a method are packaged into objects and the method in the proxy is then invoked with the arguments. The input arguments, such as nested classes/structures and various data types, can be very complex.

Windows Application Wizard

The Windows Application Wizard is a step-by-step process that enables you to set up multiple tests in a Resource for a 32-bit Windows-compliant application (WinApp). Proprietary systems as well as specific end-user driven tests on most platforms can be rapidly built, such as for Windows Forms or Citrix.

This wizard includes a Script Editor enabling you to script a test for a specific application. The process of building a script can be repeated multiple times to build multiple tests for a single application.

The Helper Utility can optionally be run to discover application information such as screen text and mouse position. This utility is able to capture application images to be used for comparison tests.

Although the applicability of the Windows Application wizard in creating Monitors is limited only by the user's imagination, its primary usefulness is to provide testing solutions where other Kofax Monitor wizards are not available.

For example, the Windows Application wizard can be used to test the readiness and availability of a complex web application or Citrix (server application hosting interface software) session.

Windows Event Log Wizard

The Windows Event Log Wizard enables you to create a Resource specifying a Windows Event Log to test for the occurrence of a specific event. You can test the Event Log for specific event entries written by a specific source. You can also search for/ignore up to three keywords in the description of the specific event.

There are three standard types of Windows Event Logs:

- Application
- Security
- System

You can also specify the type of event you want to test. There are six types of events:

- Audit failure
- Audit success
- Error
- Information
- Success
- Warning

Specifying the log and type of event instructs Kofax Monitor to test a particular log for a particular event type. For example, you can test the application log for error events to determine when an application is not operating properly.

WMI Wizard

The WMI Wizard uses Windows Management Instrumentation (WMI) to query information from local or remote Windows systems for use in a Monitor. This wizard enables you to monitor devices, memory, processes, services, printers, etc. This is just a few of the many WMI classes available to use with the wizard.

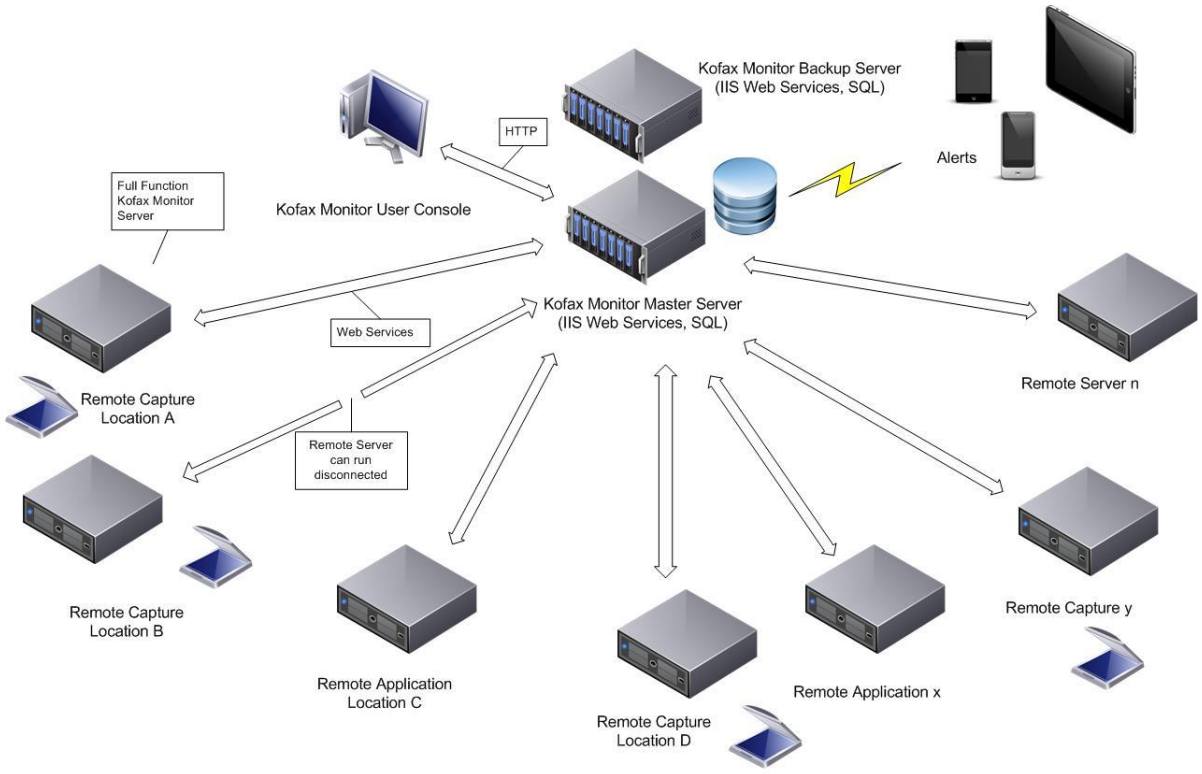
Kofax Monitor Distributed Servers

Kofax Monitor's Distributed Server optional feature enables the Kofax Monitor Server to be proactively operating at multiple geographic locations, running the same or different sets of Monitors at each location. Kofax Monitor Remote Servers run local Monitors, and then send monitoring results over encrypted Web Services connections. Additionally, local alerts can optionally then be sent to one or more Kofax Monitor Master Servers.

A Kofax Monitor Remote Monitor's status and reports can be viewed as if the Monitors were located and running on the Kofax Monitor Master Server.

Kofax Monitor supports operating in a High Availability (HA) configuration, leveraging the failover cluster manager in Windows Serve using the generic service resource to accomplish active/active HA. Kofax Monitor also supports operating in a 3-tier implementation to further isolate Kofax Monitor subsystems (Kofax Monitor, database and web server).

Regional call centers, remote operations centers, and distributed capture facilities are a few of the candidates for the Kofax Monitor Distributed Server option. An example implementation is shown below.



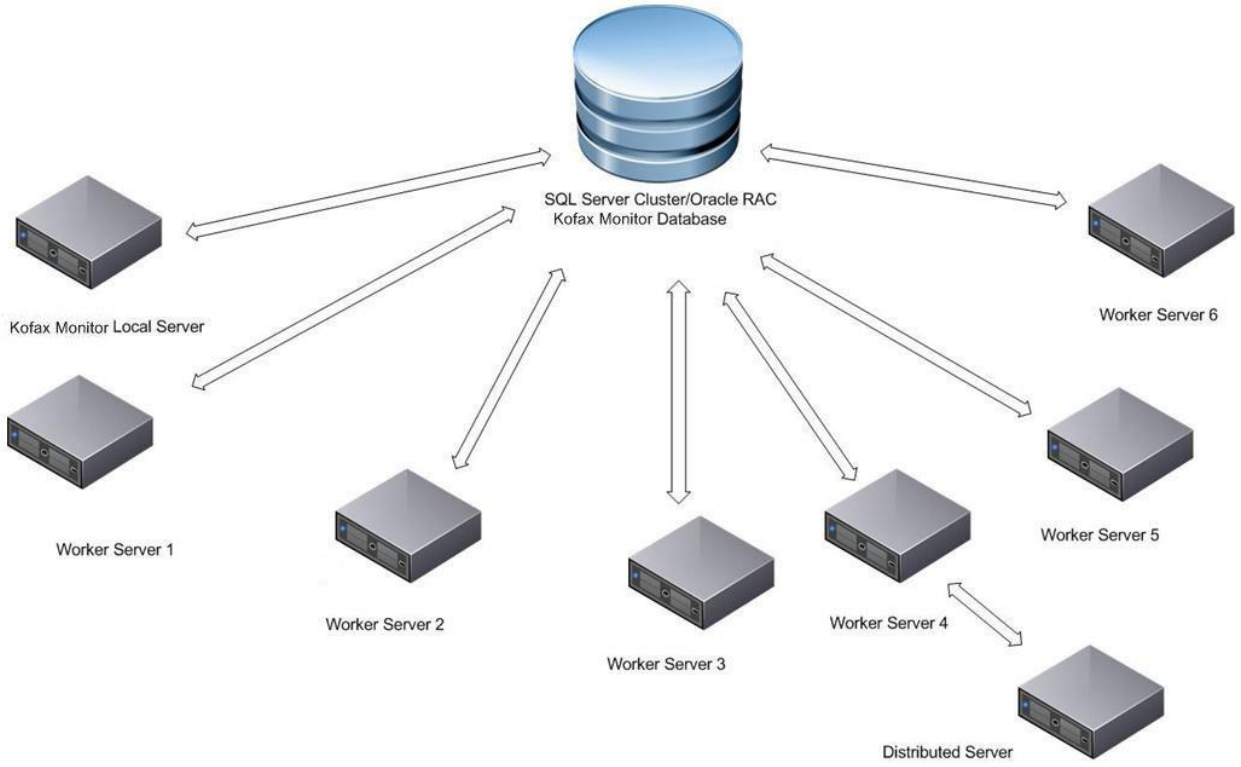
Kofax Monitor Distributed Scenario

Kofax Monitor Multi-Server

The multi-server feature enables multiple Kofax Monitor Servers, known as Kofax Monitor Worker Servers, to use a single shared Kofax Monitor database. Monitors can be assigned to separate Worker Servers to provide scale out capabilities leveraging a single shared Kofax Monitor database.

Kofax Monitor's multi-server feature enables multiple Kofax Monitor servers, known as Kofax Monitor Worker Servers, to use a single shared Kofax Monitor database. Monitors can be assigned to separate Worker Servers to provide scale out capabilities leveraging a single shared Kofax Monitor database. Kofax Monitor's multi-server configuration can then be combined with the optional distributed feature for maximum Kofax Monitor architecture flexibility.

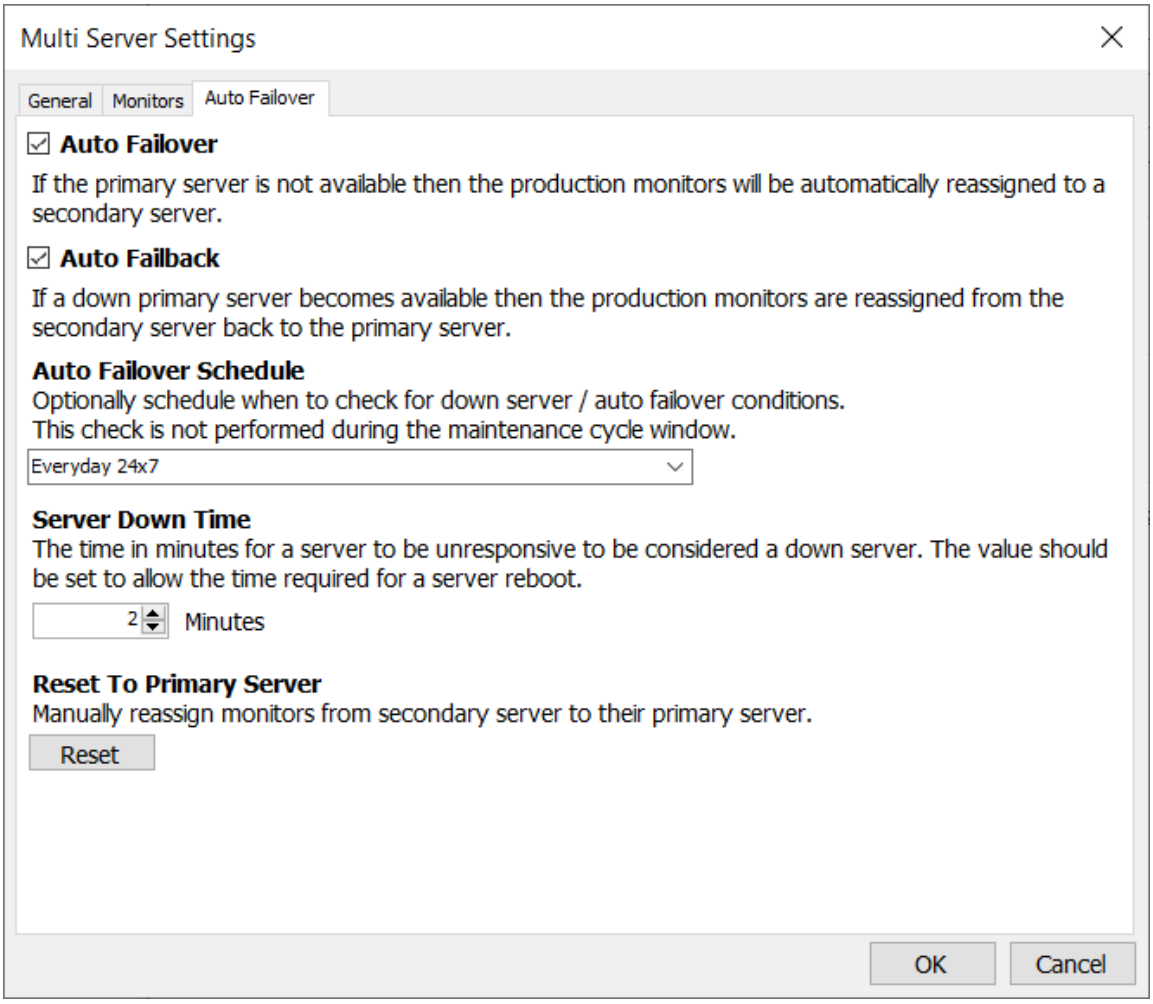
Centralized locations with multiple Kofax Monitor servers are excellent candidates for the multi-server option to reduce the number of Kofax Monitor databases and support costs. An example implementation is shown below.



Kofax Monitor Multi-Server Scenario

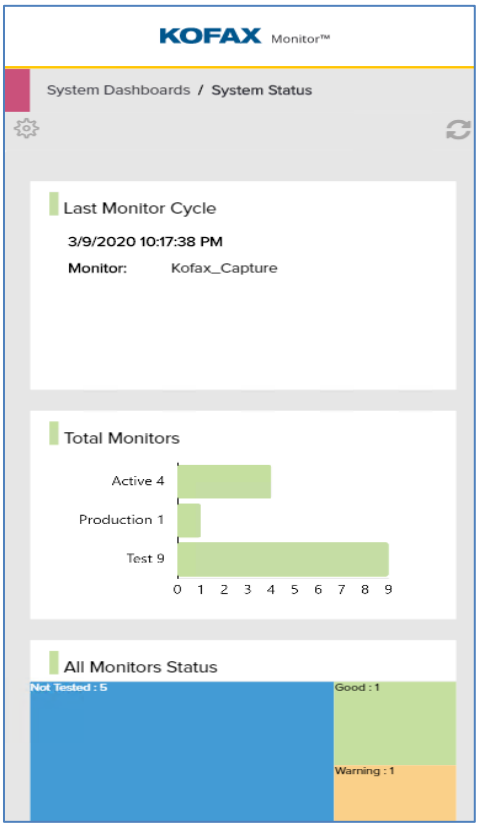
Kofax Monitor High Availability

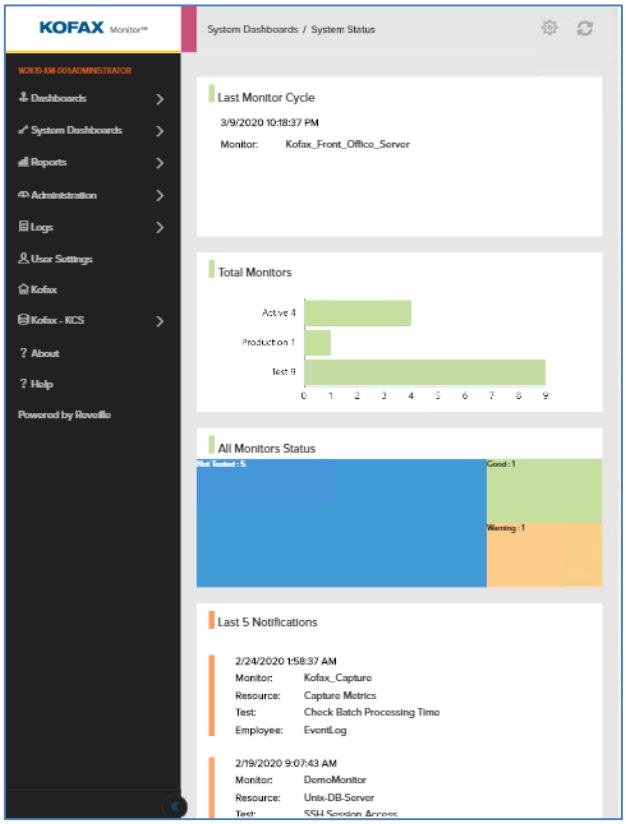
The multi-server auto failover feature enables multiple Kofax Monitor Servers, known as Kofax Monitor Worker Servers, to offer a high availability option. If the primary Kofax Monitor server is not available within a configured time frame, Kofax Monitor will automatically assign the monitors from the primary Kofax Monitor server to the secondary Kofax Monitor server. Upon the primary Kofax Monitor recovery, the optional auto failback can automatically move the monitors back to the primary Kofax Monitor server. This time period for fail over/ fail back can also be controlled by using a Kofax Monitor schedule.



Kofax Monitor Mobile Browser Support

The Kofax Monitor User console is available for browser delivery to mobile devices. Kofax Monitor includes responsive web designed web pages supporting major mobile device platforms such as the Apple iPhone, iPad, and Google Android. You can observe, administer, and view reports on mobile devices to fit your mobile work-style needs.





Note Mobile browsers require Windows authentication support for authorized access to the Kofax Monitor web site.

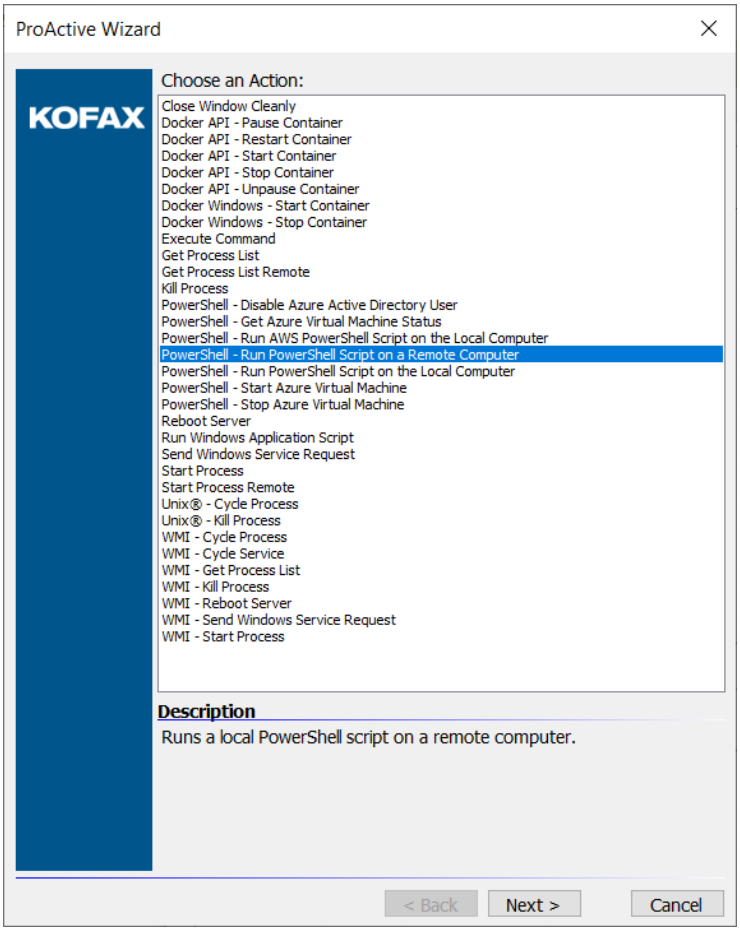
Proactive Remediation

Kofax Monitor includes a remediation component that allows you to complete tasks related to Kofax Monitor errors proactively.

Proactive lets you respond to errors through an automatic response, which can prevent the need for manual intervention. You can add a Proactive action that is not tied to a specific test yet can be tied to a specific error message.

The following list and figure provide examples of some of the actions Proactive can take when responding to an error:

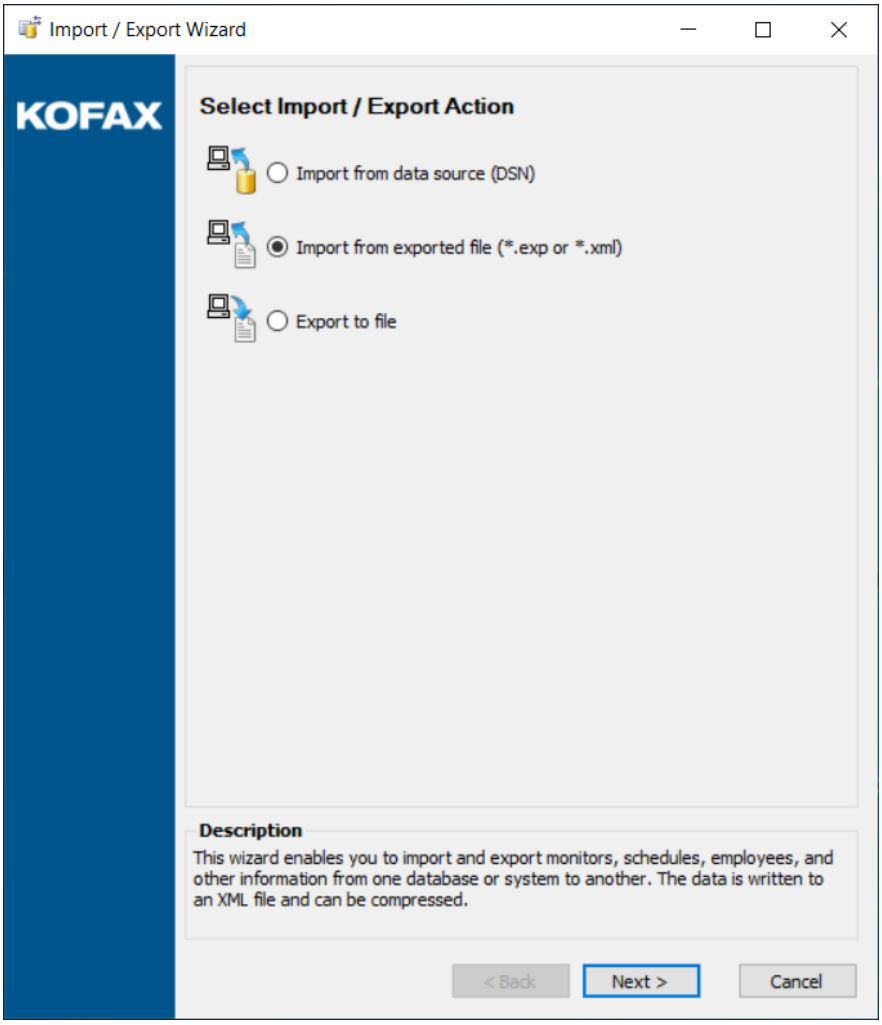
- Stop and restart an application process on the same or different servers.
- Start an application.
- Get a process list.
- Run a Docker command action.
- Run a PowerShell script.
- Run an Azure or AWS based PowerShell script.
- Stop and restart a Windows service on the same or different servers.
- Check an application to see if it is running.
- Reboot a server.
- Run a command file.



Kofax Monitor Proactive Remediation

Monitor Import/Export

The Import/Export Wizard enables you to import and export employees, Monitors, Monitor Groups, Paging Providers, Schedules, and Support Groups from one database or Kofax Monitor system to another Kofax Monitor system. This is very helpful when moving Monitors through an Agile development process.



Kofax Monitor Import/Export Wizard

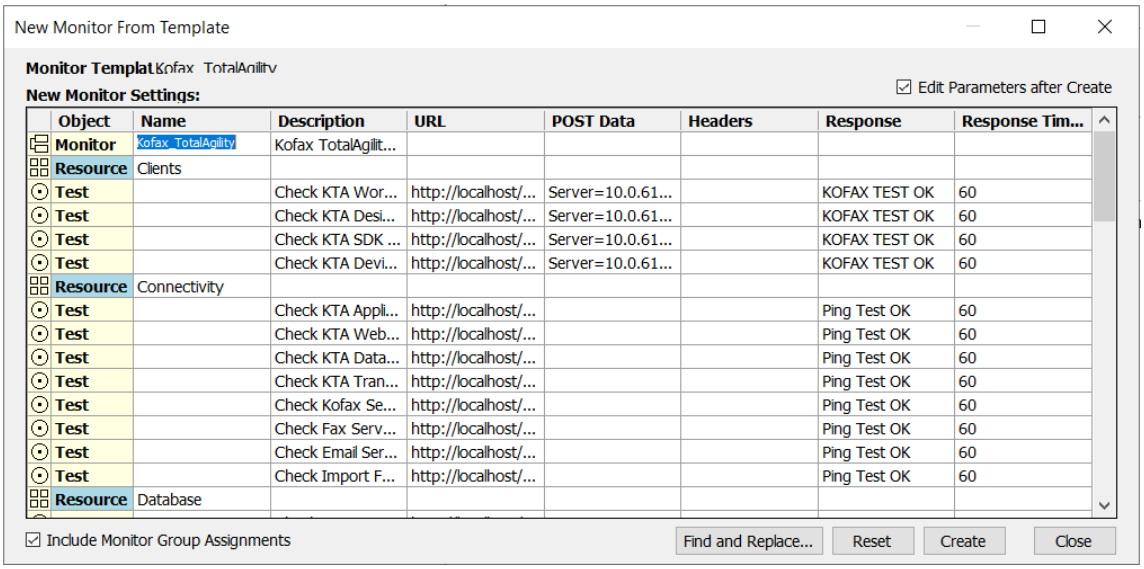
The Import/Export Wizard enables you to export a Monitor to an XML file. When exporting a Monitor in Kofax Monitor, you have the ability to include the following options along with the Monitor:

- Schedule assignments, Test credentials, Test parameters, Notification assignments, Proactive actions, or Test errors

Monitor Export Options

Monitor Templates

Monitor Templates can be used to help facilitate the process of creating or cloning new Monitors. The templates can be imported, and then edited to fit your needs. This is especially useful in cases where there is not a Wizard to help create a Monitor from the initial creation or using a baseline monitor for another Kofax application or environment.

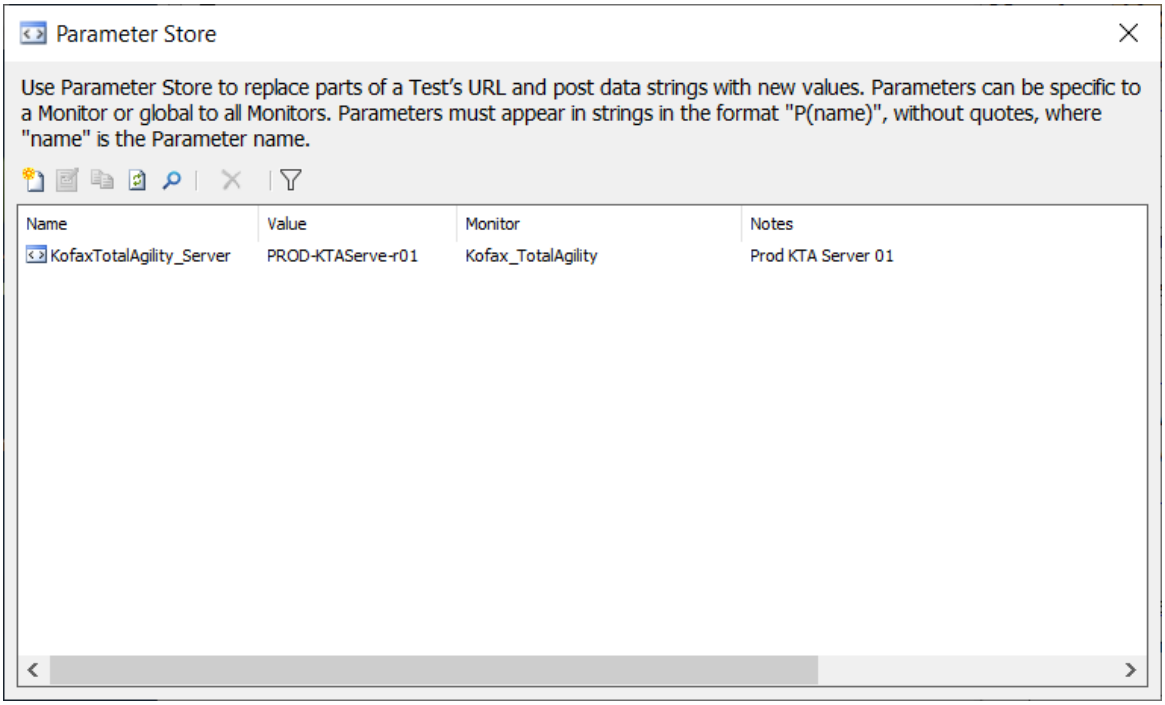


Kofax Monitor Template

Parameter Store

The Parameter Store feature allows the replacement of a Monitor Test's URL and post data strings with new values. This occurs when a Monitor Test is run by the Reveille monitor service. This feature is similar to variable substitution, except that the new values are user-defined and stored in the Reveille database. Parameters can be specific to a Monitor or global to all Monitors. This facilitates the creation of generic, template-like Monitor Tests and simplifies long term Monitor maintenance.

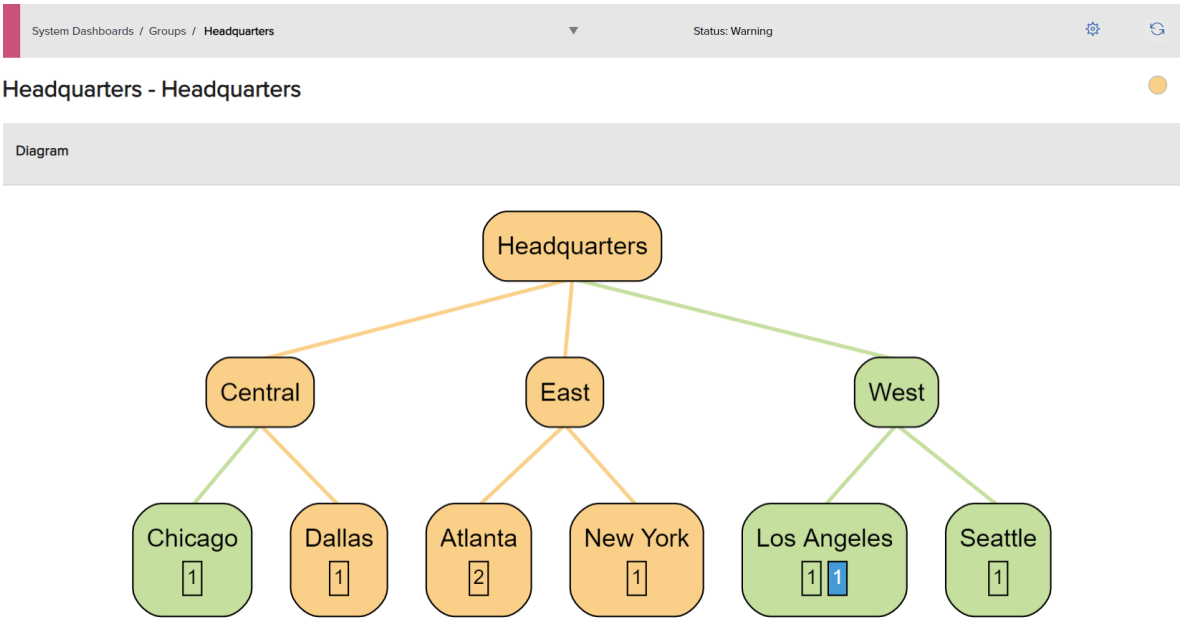
The parameter string will be replaced at the Monitor Test execution time with the corresponding value of the parameter from the parameter store. If the parameter is defined for the current Monitor, that value is used; otherwise, the global parameter value will be used to replace the parameter string.



Kofax Monitor Parameter Store

Grouping

Kofax Monitor Grouping provides a way to aggregate Monitors into logical groups based upon user-defined criteria, such as geographic location, company, function, and so on. Each business view can then be secured at individual group levels using Windows Domain security. This feature enhances the communication of application status and service levels using relevant business semantics or terminology.



Kofax Monitor Geographic Groups

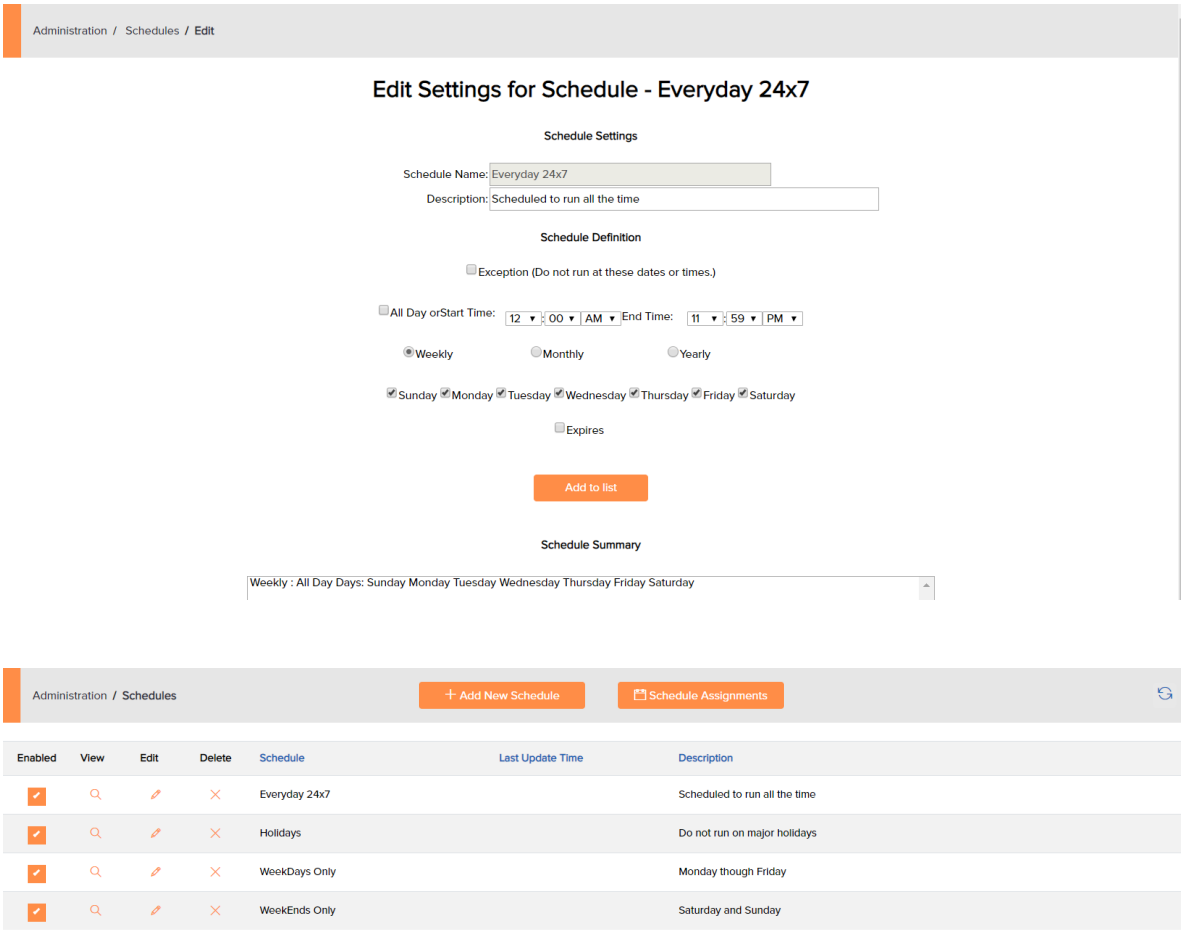
Scheduling

The Kofax Monitor Scheduling tools allow you to create both simple and complex schedules for scheduling Monitor operation. This flexibility allows the Monitor operation to match the desired operating windows for measuring application service levels.

You can assign schedules at every level of the Kofax Monitor hierarchy – Monitor, Resource, and Test. All schedules are available for assignment. Because of *inheritance*, a schedule assigned at one level is also passed down to the "children" of that element. For example, a schedule assigned to a Monitor is automatically assigned to the Resources that make up the Monitor. Likewise, the schedule assigned to a Resource is applied to the tests in that Resource.

The Schedule tab within a selected Server's configuration options show inherited schedules for a specific Server, Monitor, Resource, or Test. Schedule inheritance is *default behavior only*. You can assign *any* schedule to *any* Monitor, Test, or Resource.

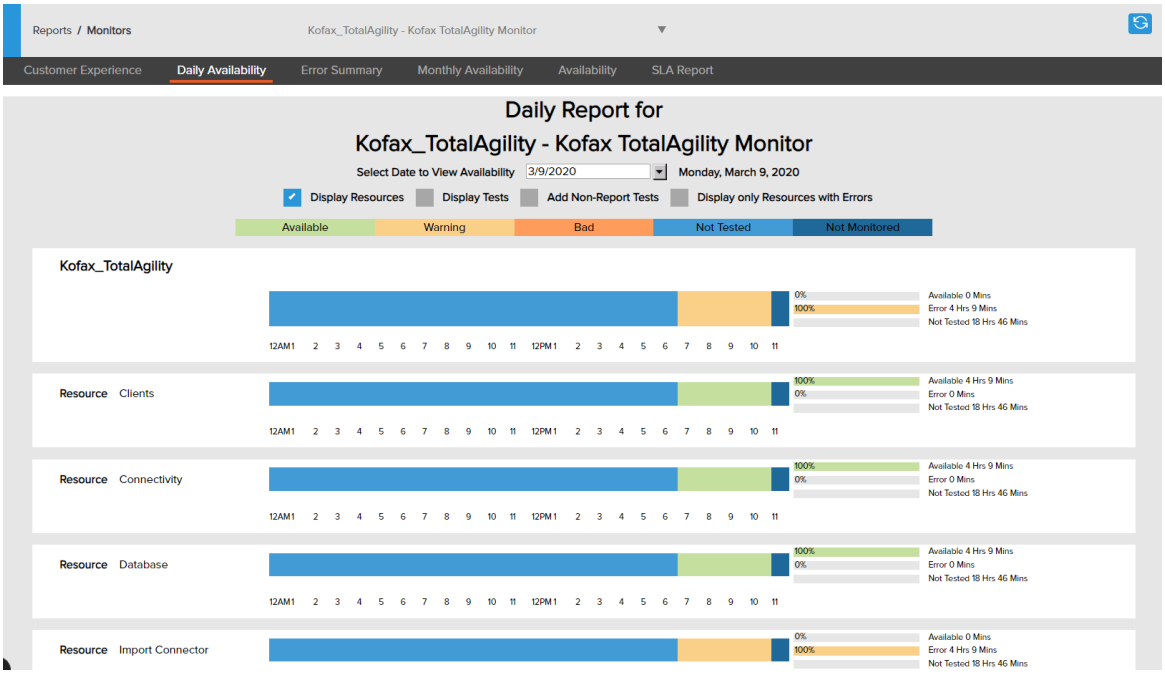
Normal operating and exception-based schedules can be created for daily, weekly, and yearly intervals. Schedules can also be automatically deleted after schedule expiration or 'one-time' use.



Kofax Monitor Schedule Administration

Reporting

Kofax Monitor offers a wide spectrum of reports for reviewing and analyzing application status and availability. Reports are available for the Group, Monitor, Resources, and Scorecard metrics. The reporting function enables users to specify time ranges and reporting parameters to run any online report in “batch” mode, providing automatic report distribution.



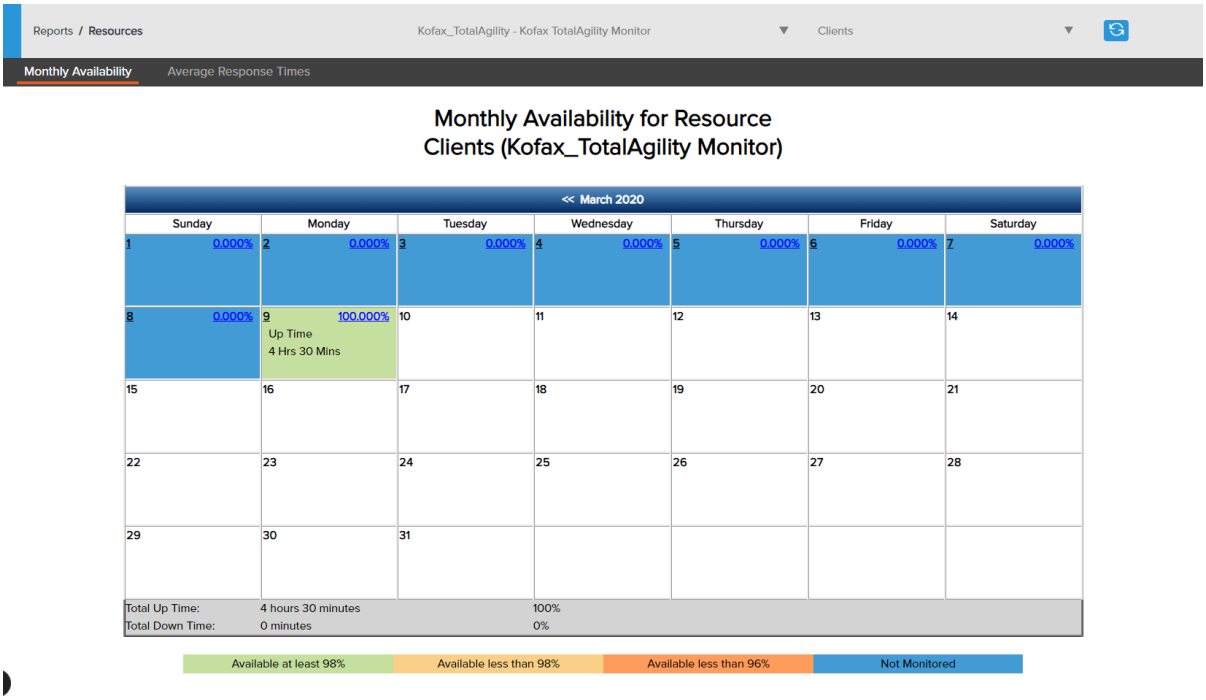
Kofax Monitor Report Selection

Resource Reports

Kofax Monitor offers the following Resource reports.

Monthly Availability by Resource

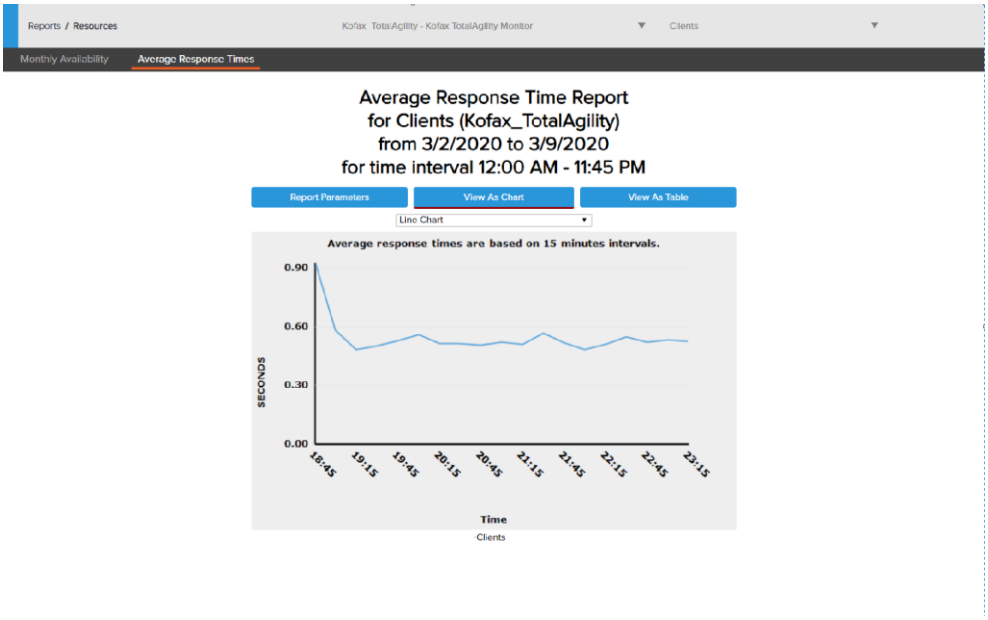
Indicates the time the Resource has been "up" the current monitoring month. It also indicates by color coding whether or not the Service Level Agreements were met on a particular day.



Monthly Availability for Resource Report

Average Response Times by Resource

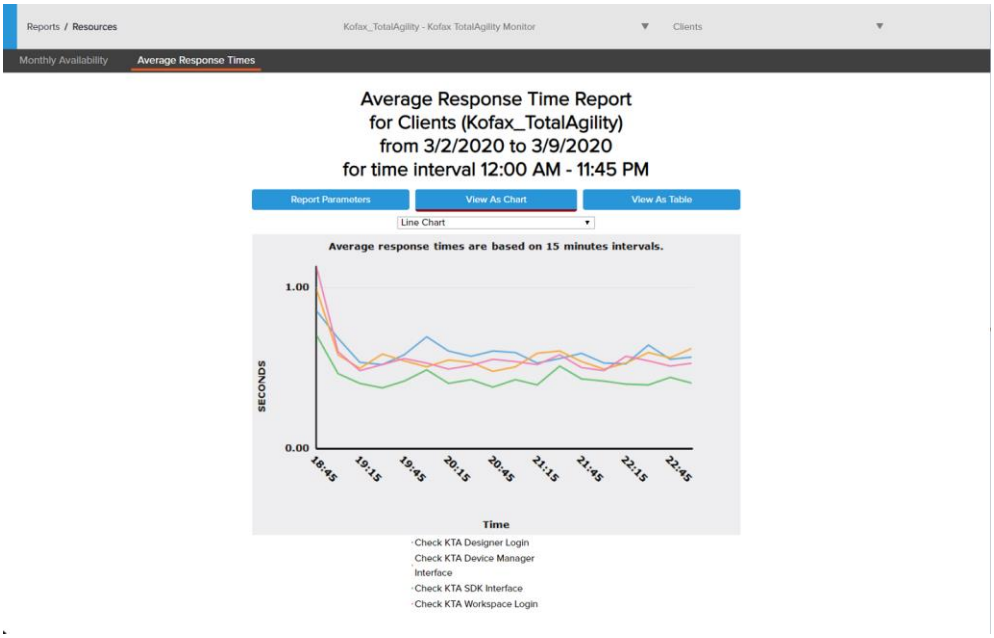
Charts the average response times over a selected period of time for a particular Resource.



Average Response Time Report

Average Response Times by Resource/Test

Charts the average response times over a selected period of time for one or more selected Resource tests.



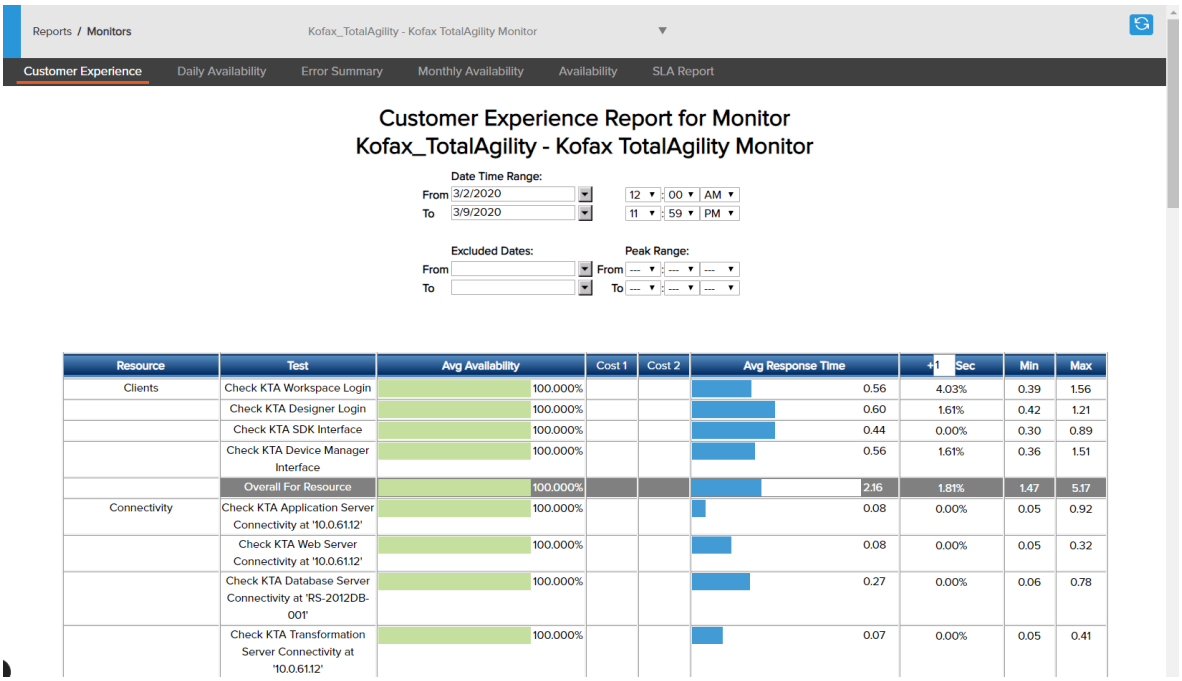
Average Response Time by Resource/Function Report

Monitor Reports

Monitor reports include the availability and error information for the entire application being monitored. Kofax Monitor provides the following Monitor reports.

Customer Experience Report

Displays details about the availability of the Resource functions of a given Monitor.

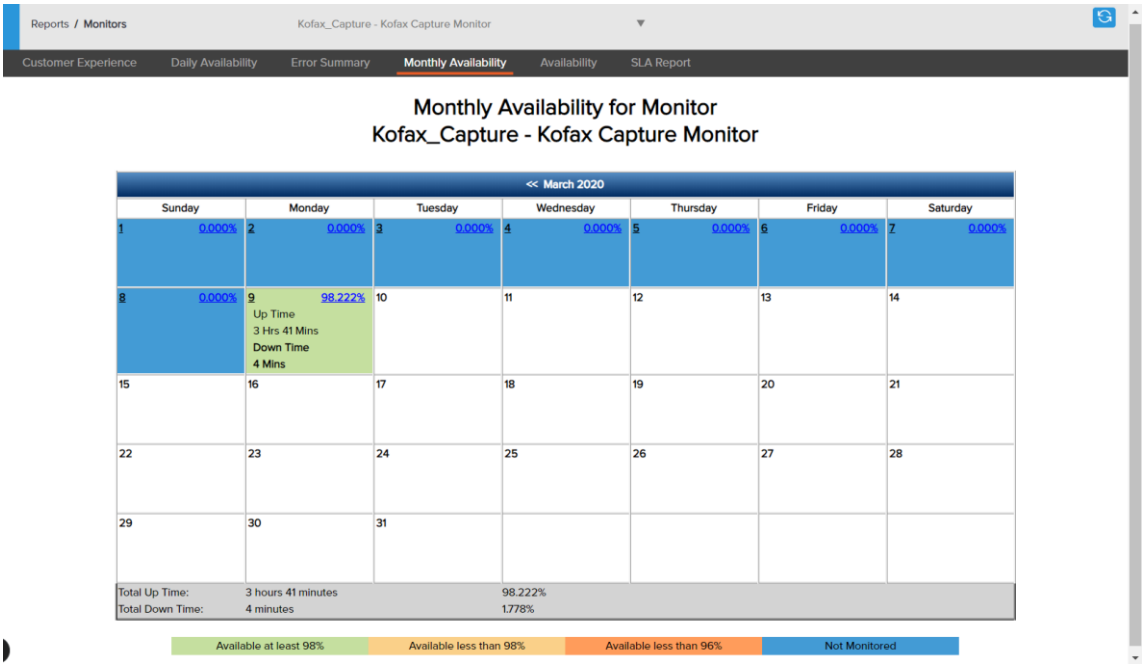


Resource	Test	Avg Availability	Cost 1	Cost 2	Avg Response Time	+1 Sec	Min	Max
Clients	Check KTA Workspace Login	100.000%			0.56	4.03%	0.39	1.56
	Check KTA Designer Login	100.000%			0.60	1.61%	0.42	1.21
	Check KTA SDK Interface	100.000%			0.44	0.00%	0.30	0.89
	Check KTA Device Manager Interface	100.000%			0.56	1.61%	0.36	1.51
	Overall For Resource	100.000%			2.16	1.81%	1.47	5.17
Connectivity	Check KTA Application Server Connectivity at '10.0.61.12'	100.000%			0.08	0.00%	0.05	0.92
	Check KTA Web Server Connectivity at '10.0.61.12'	100.000%			0.08	0.00%	0.05	0.32
	Check KTA Database Server Connectivity at 'RS-2012DB-001'	100.000%			0.27	0.00%	0.06	0.78
	Check KTA Transformation Server Connectivity at '10.0.61.12'	100.000%			0.07	0.00%	0.05	0.41

Customer Experience Report

Monthly Availability

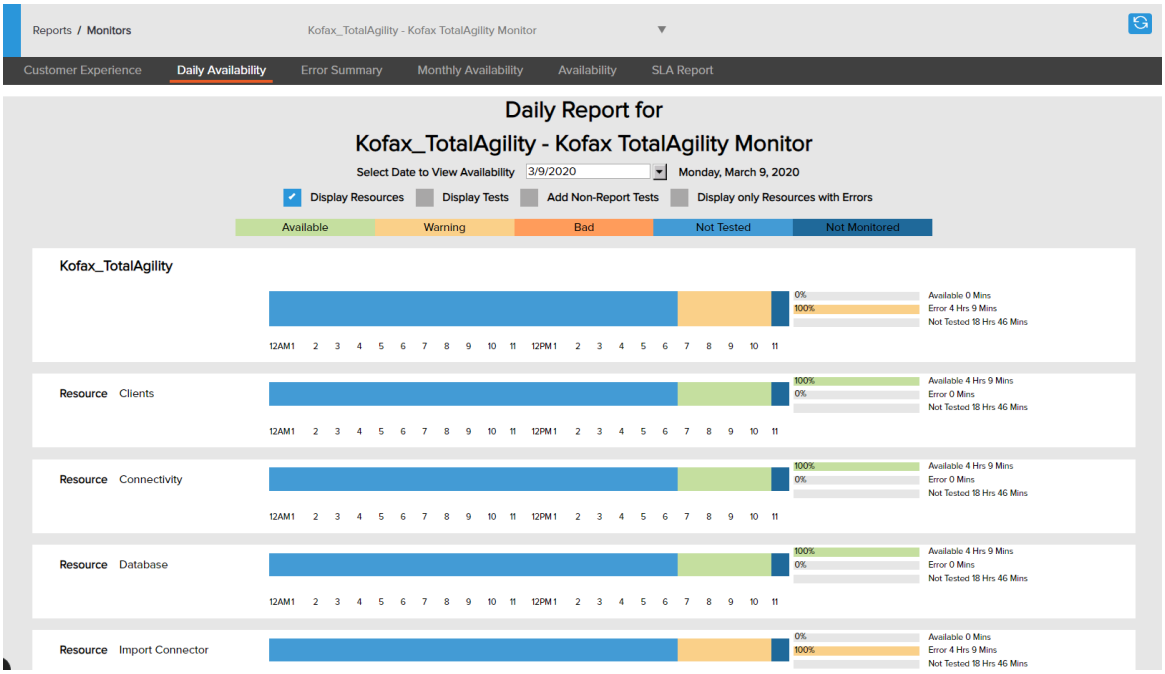
Indicates the time the application has been "up" (accessible) or "down" (not accessible) for each day during the previous month and the current monitoring month. It also indicates by color-coding whether the Service Level Agreement was met on a particular day.



Monitor Monthly Availability Report

Daily Availability

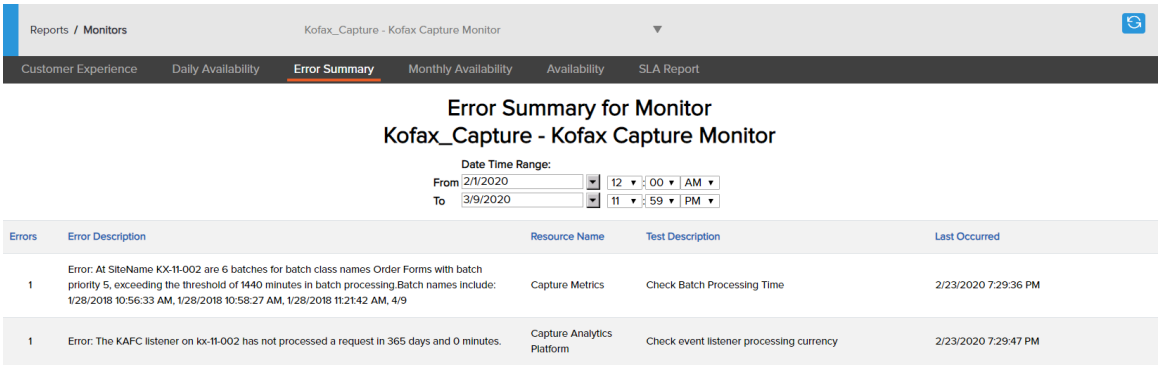
Indicates the time the application has been "up" (accessible) or "down" (not accessible) for a specific day. It also indicates by color-coding whether the Service Level Agreement was met during a particular hour. You can choose to include all resources, all tests, only resources with errors, or add non-SLA tests.



Monitor Daily Availability Report

Error Summary

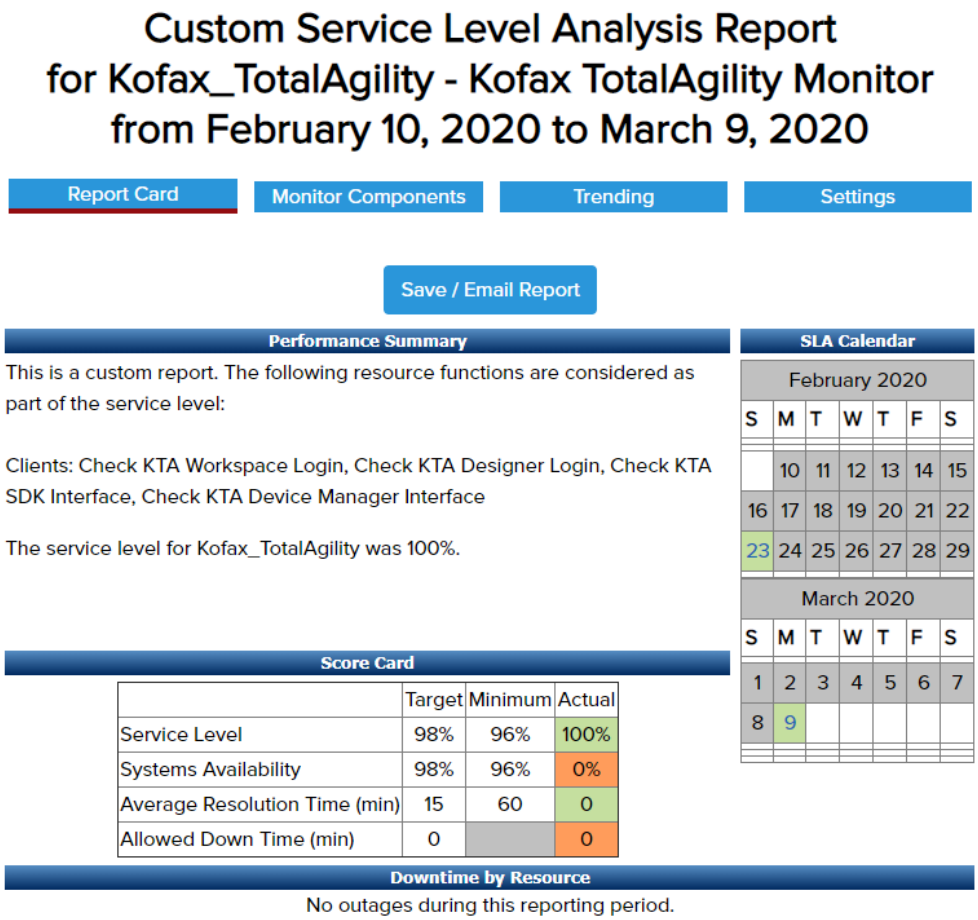
Summarizes the error occurrences for a given Monitor.



Monitor Error Summary Report

SLA Reporting Module

Displays a performance summary for the selected application and evaluates whether it has met designated service levels for the specified time period.



Monitor Service Level Analysis Report

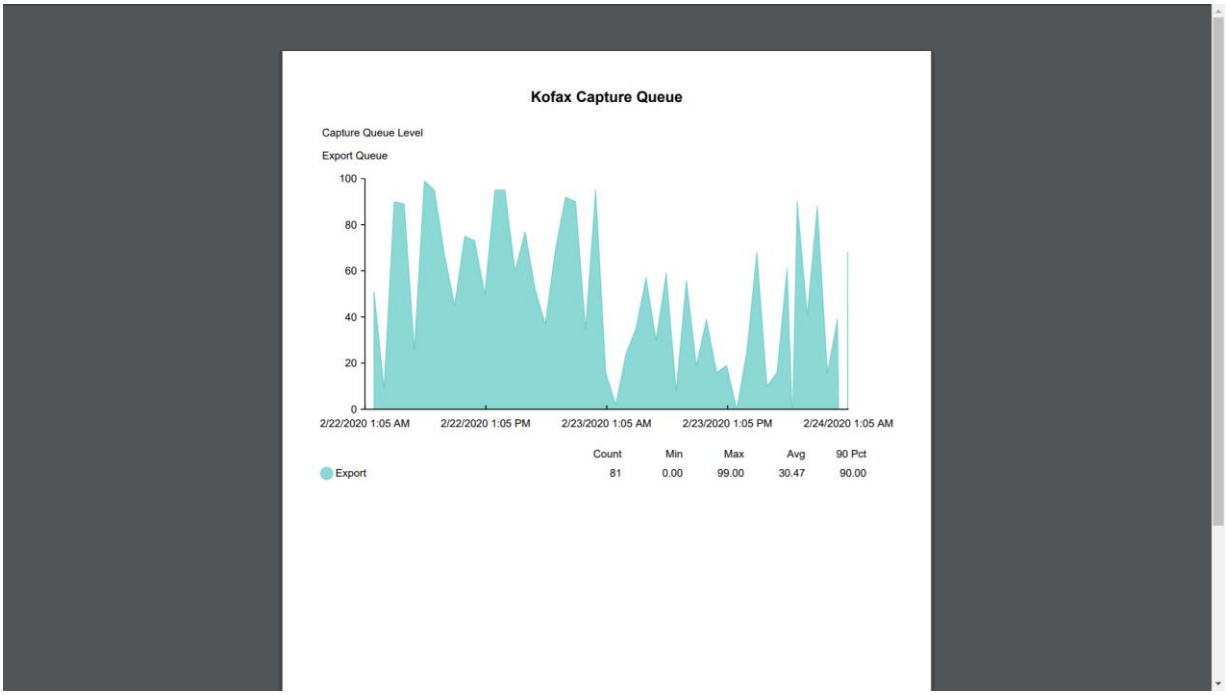
Group Reports

Group reports include the availability and error information for groups containing Monitors. These reports are similar to Monitor reports but from a Group level perspective. Kofax Monitor provides the following group reports:

- **Customer Experience Report**: This report can be viewed showing Groups only or Groups and Monitors.
- **Daily Availability Report**: This report shows the availability of the Group for the selected day.
- **Monthly Availability Report:** This report is the same as the Monitor report except it is the average of all the Monitors contained in the selected group.
- **SLA Reporting Module:** This report provides a performance summary for the selected group and evaluates whether it has met designated service levels for the specified time period.

Dashboard Reports

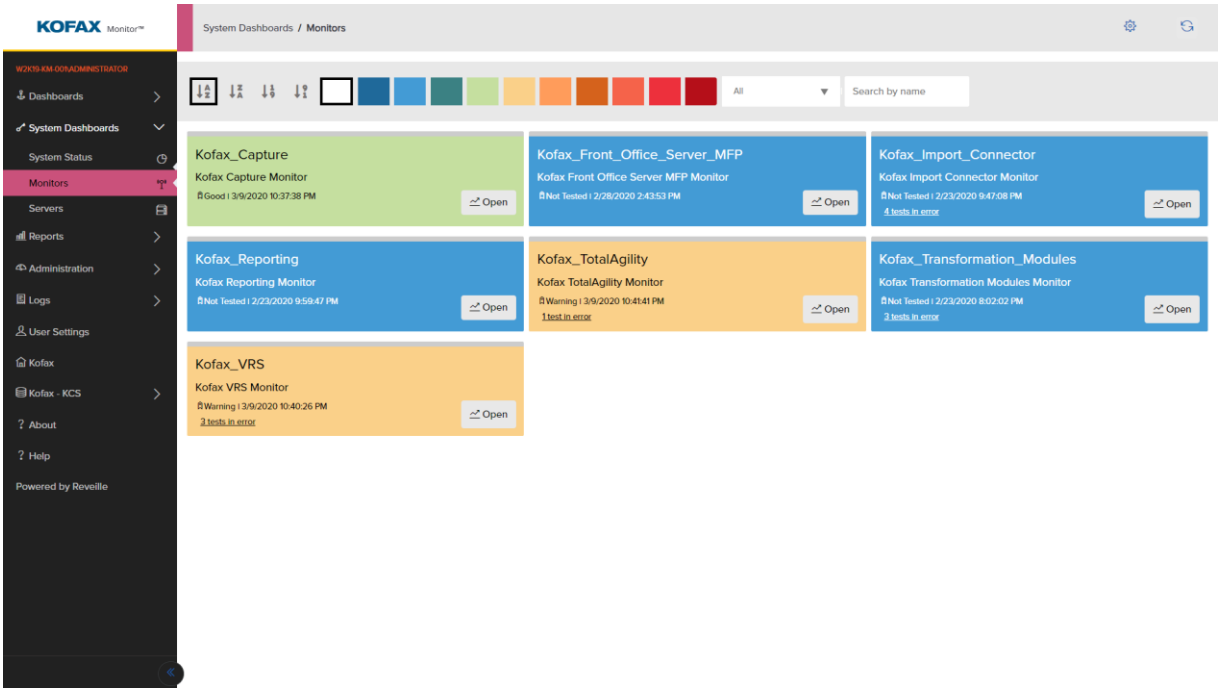
Dashboard reports are available in either online grid, PDF, or Excel formats. Each separate visual in a Dashboard metrics card will create an individual Dashboard report. The metric name and metric description is listed for each Dashboard grid view. The grid report data can be exported to either a PDF or Excel® file by clicking the menu option for each grid view.



Kofax Monitor Dashboard Report

Dashboard

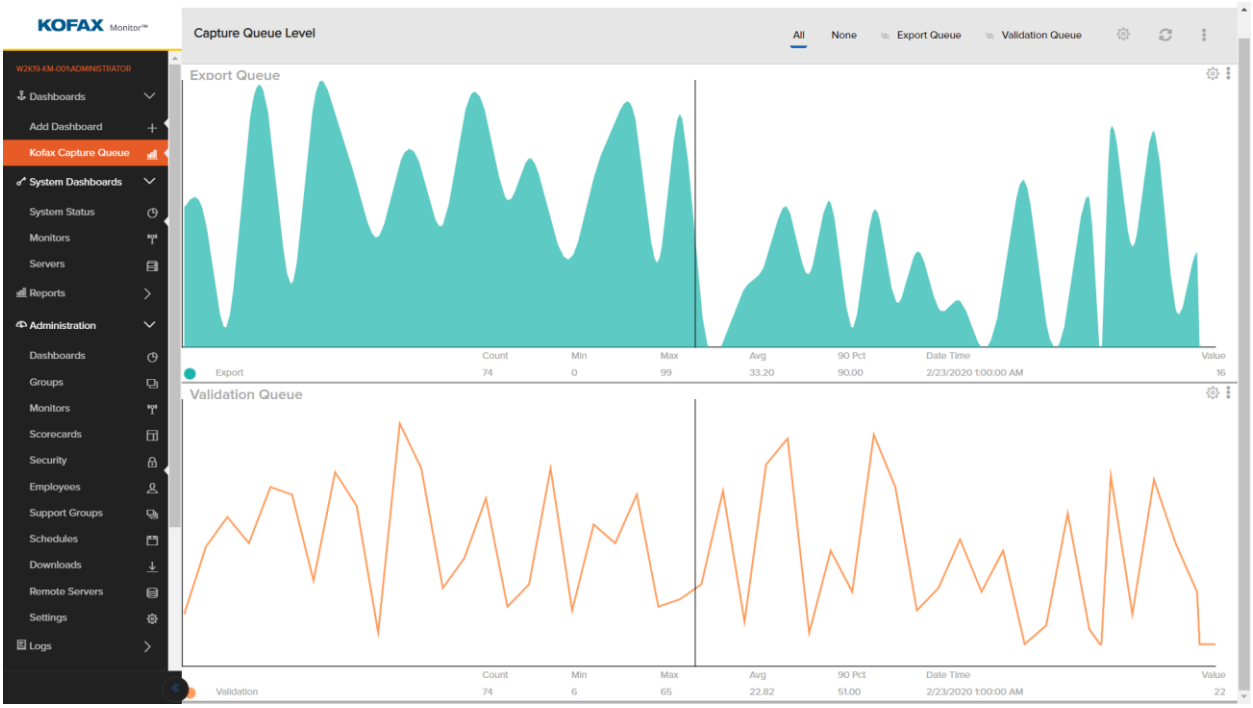
The Kofax Monitor User Console Dashboard summarizes the entire application portfolio — providing a single "at a glance view" of the health of the infrastructure and components. Details are shown at the macro level with drill down capabilities on whether the application has been "up" (accessible) or "down" (not accessible) for each day during the previous month and the current monitoring month. It also indicates – through color-coding – whether SLAs are achieved or missed for the time period under review.



Kofax Monitor User Console Monitor Dashboard

Metrics

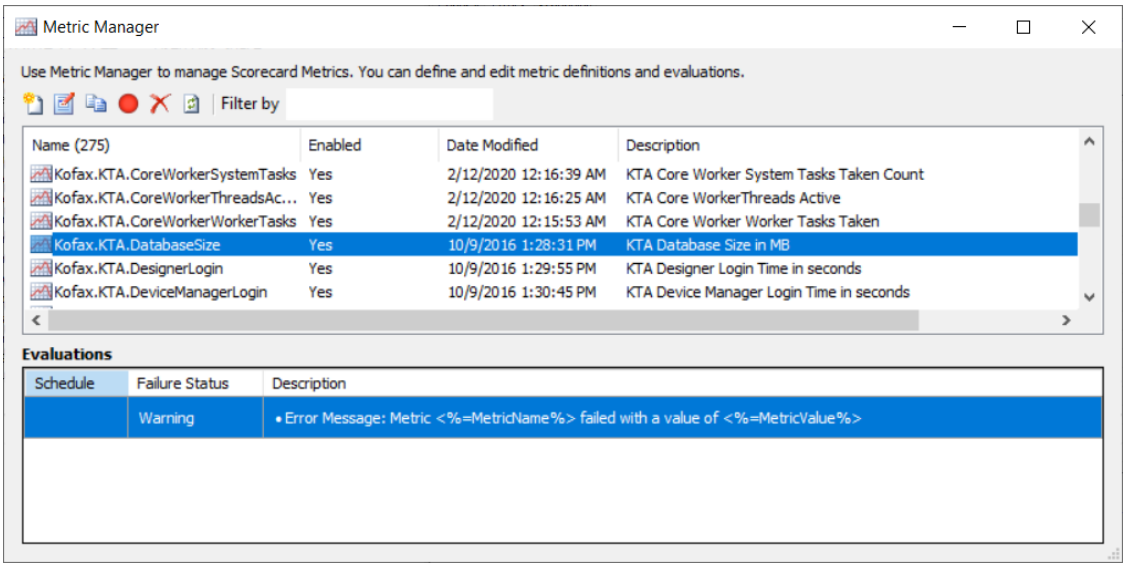
Metrics provide a way to track operational, license, and response time information received by monitor tests. A metric is numeric value that can be tracked by Kofax Monitor along with attributes. When a metric is returned from a Kofax Monitor test, the value can be evaluated to determine the status of the test and used by Kofax Monitor within notifications. The metric values can be viewed in the User Console in a Dashboard. Kofax Monitor includes a base set of metrics for each specific Kofax monitor type.



Kofax Monitor Dashboard View

Metrics Manager

The Metric Manager provides a central location to manage metric definitions, evaluations, and messages.



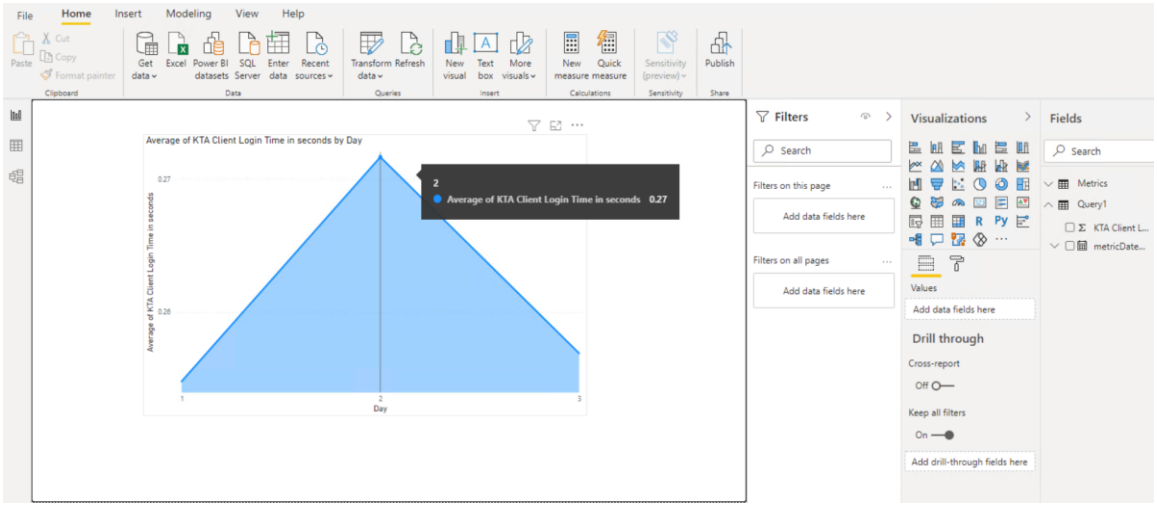
Kofax Monitor Metric Manager

Data Visualization

Kofax Monitor provides Microsoft Power BI Data Connectors to access the powerful Kofax Monitor REST APIs. This allows Kofax Monitor data to be consumed by the Power BI data analysis and report creation tools. Kofax Monitor is providing both trusted signed and unsigned Power BI custom connectors.

The Power BI data connectors are:

- Kofax Monitor Dashboard Metrics
- Kofax Monitor Metric Attributes
- Kofax Monitor Monitor Availability
- Kofax Monitor Monitor Incidents
- Kofax Monitor Notifications
- Kofax Monitor Monitor Status
- Kofax Monitor Operating Status



Microsoft Power BI Query Editor with Kofax Monitor Metric Data

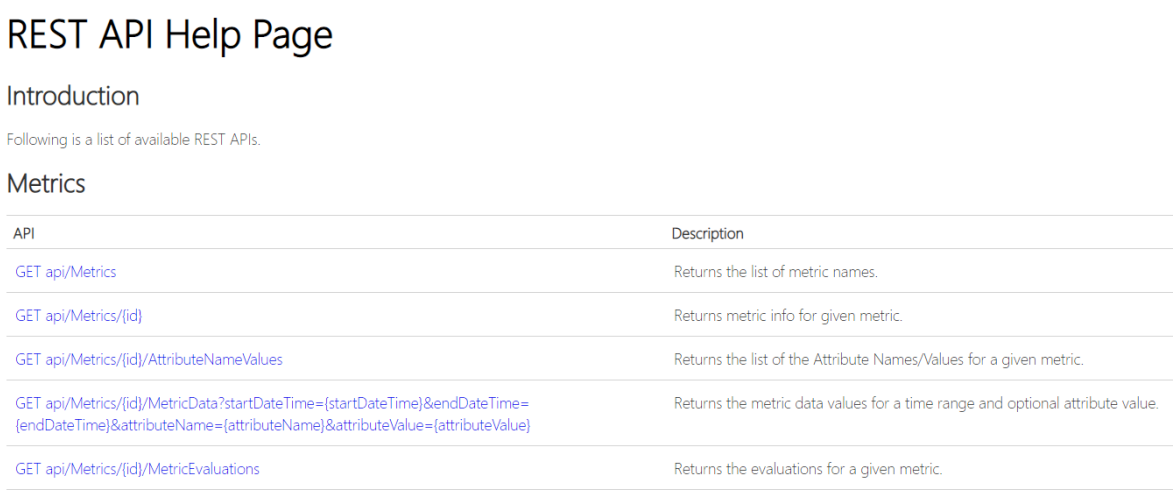
REST API

Kofax Monitor provides over 75 REST methods (GET/POST/PUT/DELETE) to administer, control operation, and query Kofax Monitor operation, configuration, metrics, and status.

The Kofax Monitor REST API service methods are available for use on a Kofax Monitor Server using normal HTTP/S protocols. The Kofax Monitor REST APIs are located on the Kofax Monitor Server under the virtual directory Reveille/API. The list of available REST APIs can be found by going to the following help link.

- http://<kofax monitor server name>/Reveille/RESTAPIHelp

To call the Kofax Monitor REST APIs you will need to know the address of the Kofax Monitor Server and the user login which includes the windows domain, username, and password for proper access. Kofax Monitor REST API's support OAuth 2.0 for authorization and use NTLM for authentication.



REST API Help Page

Introduction

Following is a list of available REST APIs.

Metrics

API	Description
GET api/Metrics	Returns the list of metric names.
GET api/Metrics/{id}	Returns metric info for given metric.
GET api/Metrics/{id}/AttributeNameValues	Returns the list of the Attribute Names/Values for a given metric.
GET api/Metrics/{id}/MetricData?startDateTime={startDateTime}&endDateTime={endDateTime}&attributeName={attributeName}&attributeValue={attributeValue}	Returns the metric data values for a time range and optional attribute value.
GET api/Metrics/{id}/MetricEvaluations	Returns the evaluations for a given metric.

Kofax Monitor REST API Help Page

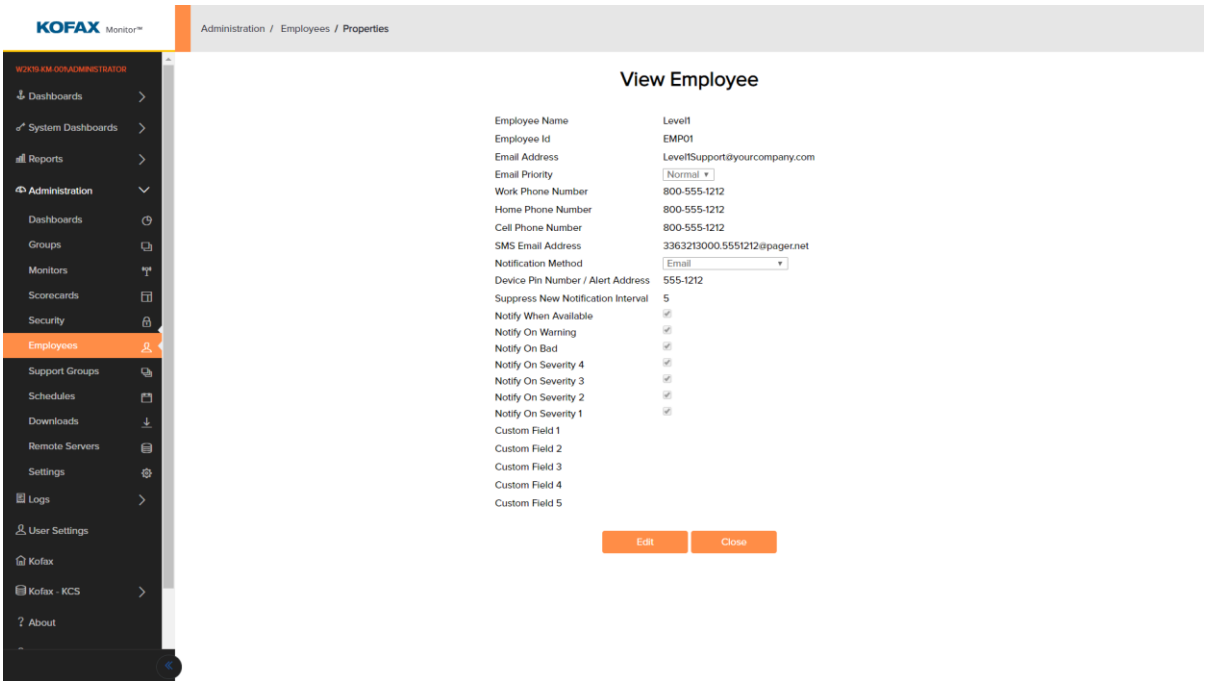
Notification

Kofax Monitor has an integrated notification subsystem. Your support team can build and maintain different support schedules through the Kofax Monitor User Console. The schedules can use different notification methods to inform the proper support resource if an incident has been detected.

The available notification methods include:

- Short Message Service (SMS) text paging
- Azure Communication Services (SMS) text paging
- Simple Mail Transfer Protocol (SMTP) e-mail (text or HTML)
- Microsoft 365 or Google Email Servers usng OAuth 2 authorization
- Simple Network Management Protocol (SNMP) traps V1 – V3
- Windows Event Log
- Write to Windows File
- Slack collaborative messaging
- Microsoft Teams collaborative messaging
- System management notification methods (such as for CA, HP, IBM, Splunk, Azure Sentinel, ConnectWise and others)
- Incident and Operations management (such as for ServiceNow, PagerDuty, BigPanda, or Ivanti)
- Custom REST or Web Service based interfaces

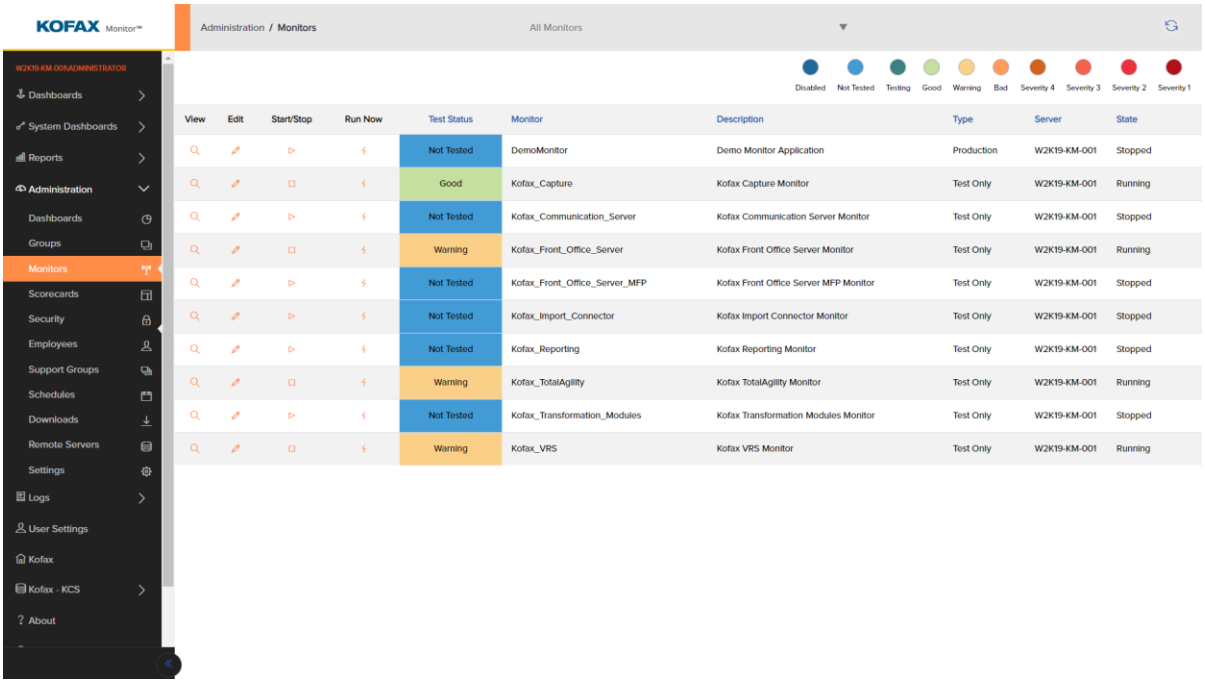
The support resources are optionally informed automatically when a problem has been corrected.



Kofax Monitor Notification Administration

Administration

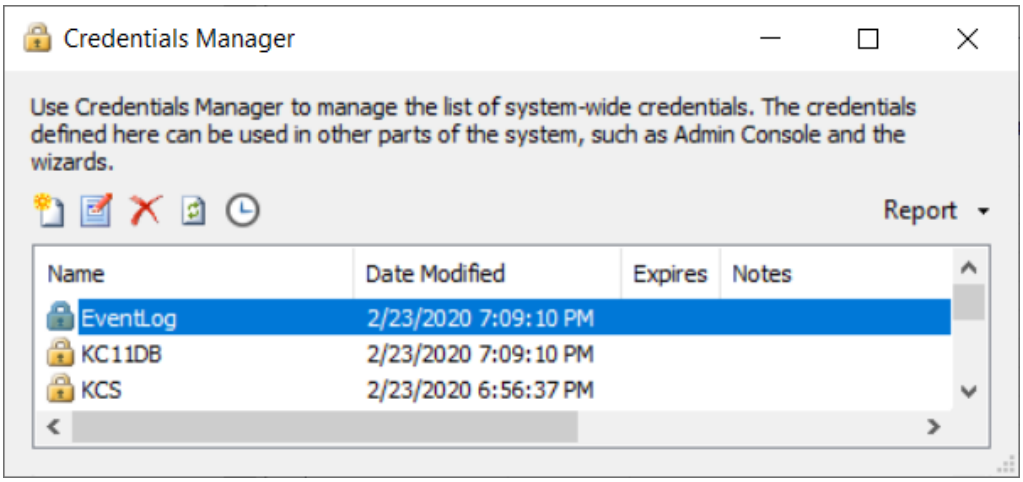
Kofax Monitor provides a secured browser page for updating many Kofax Monitor configuration options for controlling Monitor operation, adjusting Monitor parameters, implementing schedules, adding notification destinations, and administering Kofax Monitor distributed servers. Kofax Monitor clients can be downloaded for client installations from this page.



Kofax Monitor Administration

Security

As Kofax Monitor will actively test an application or business process with synthetic transactions requiring user/password access, security is a critical consideration. Kofax Monitor supports common encrypted protocols such as SSL for HTTP. Kofax Monitor encrypts all application user IDs and passwords in the Kofax Monitor database using a credential store approach. Kofax Monitor uses a FIPS complaint AES symmetric algorithm with a 256-bit key. The user ID and password are decrypted only when needed for target application access.



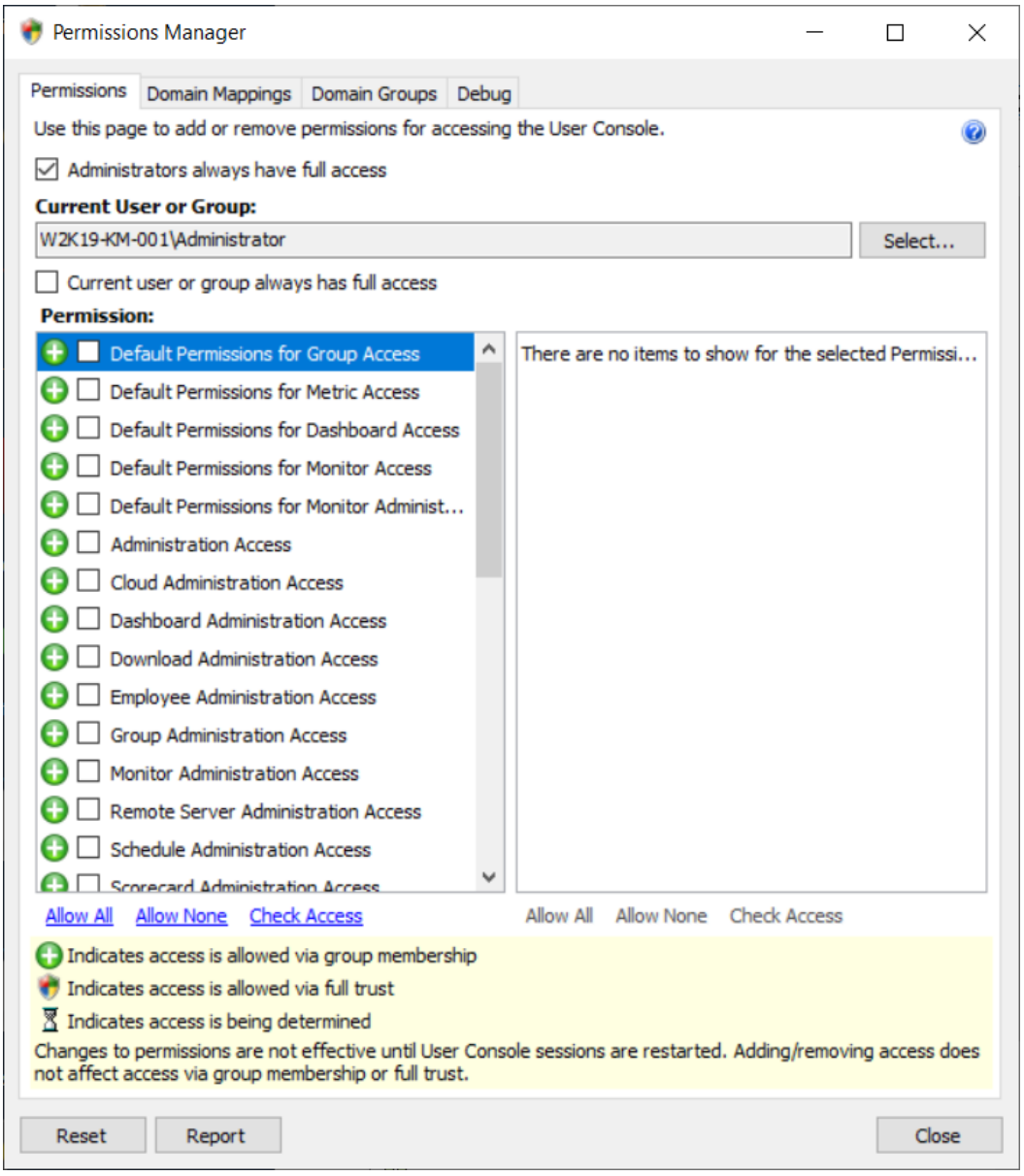
Kofax Monitor Credentials Manager

Kofax Monitor supports all common IP ports for http/https/ftp/smtp/SNMP/telnet/imap/JMX/web services protocols required for typical applications - it does not require opening another port beyond the necessary standard IP ports that one would open for regular application use. Typically, Kofax Monitor uses HTTP (80) for internet paging and web services, and SMTP (25) for email notifications. The desired IP port number for a protocol can be changed based on specific customer implementations. If additional encryption is needed, nothing prevents Kofax Monitor from accepting the data after processing by an additional encryption layer that can run under a Windows OS.

Since Kofax Monitor was originally created within a financial services organization, attention to corporate security guidelines and policies is a natural design requirement. Within Kofax Monitor, the product leverages standard Windows Domain Active Directory Services (ADS) to protect function access based on standard Windows Users or Groups along with Integrated Windows Authentication (IWA) for secure Kofax Monitor User Console access.

Specific User Console, Dashboard, and Monitor access and control functionality can be secured through the Permissions Manager, shown here.

Kofax Monitor supports the use of OAuth 2.0 with bearer token access to Kofax Monitor REST APIs to separate authorization from authentication.



Kofax Monitor Permissions Manager

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Chapter 3

What's New in Kofax Monitor

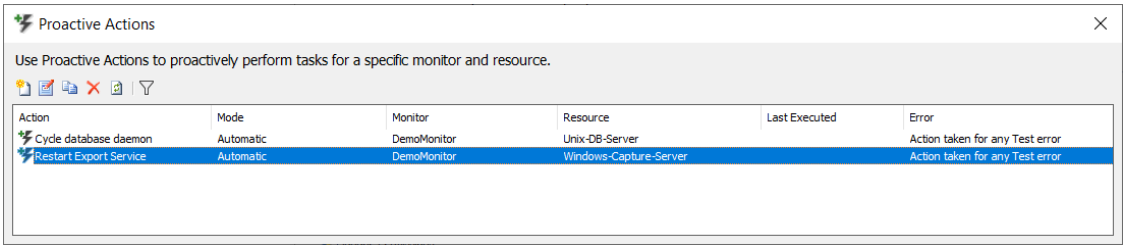
General Updates

The following general updates are contained in this release:

- All previous Kofax Monitor software maintenance updates have been included in this release
- Support for Windows 2022 Server and Oracle Database 21c
- Kofax product support currency

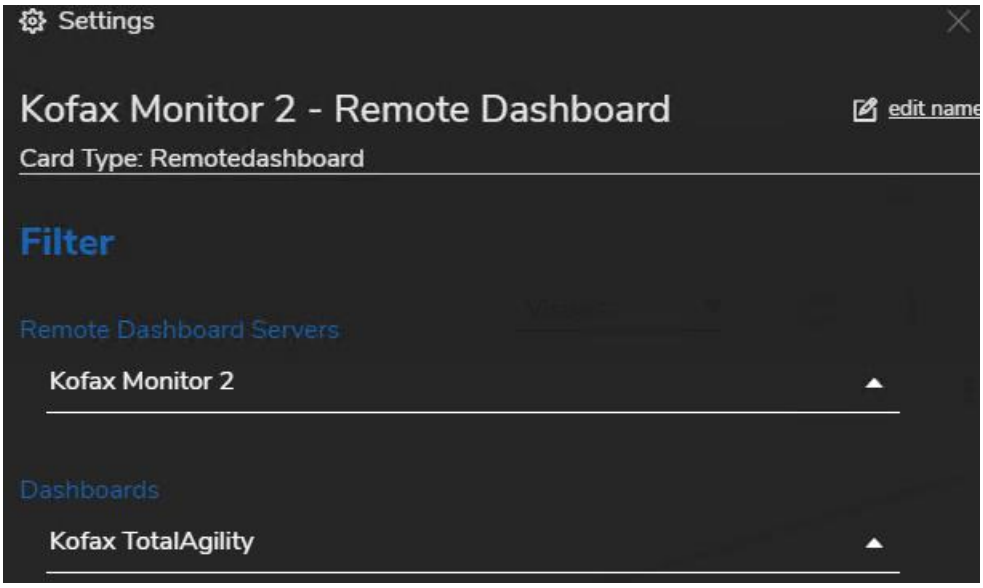
New Proactive Actions Manager

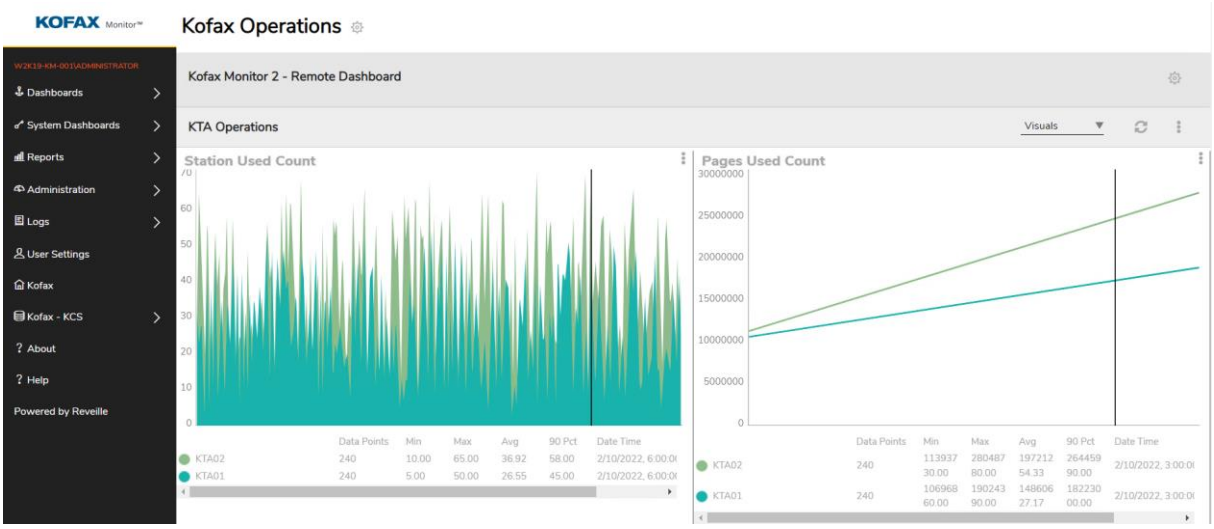
Proactive action lets you respond to errors through an automatic response, which can prevent the need for manual intervention. You can add a Proactive action that is not tied to a specific test yet can be tied to a specific error message. Now you can view, edit, copy, and delete all Proactive actions from one central menu in the Admin Console.



New Remote Dashboard Card

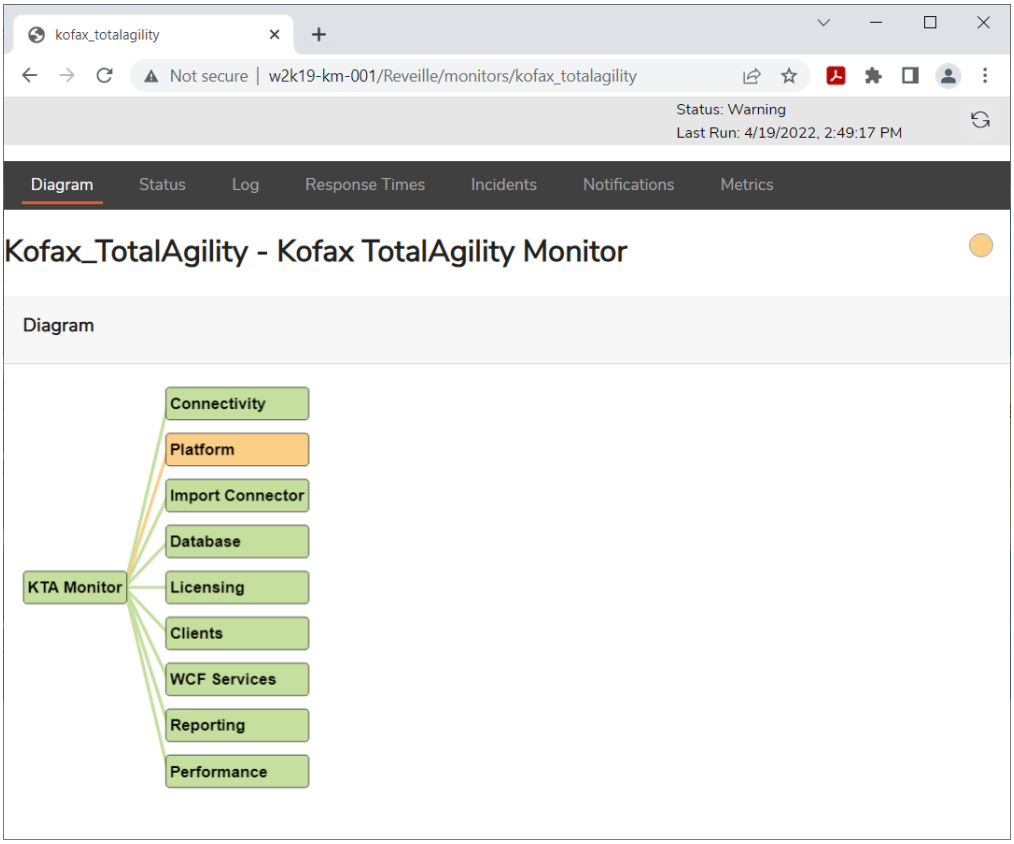
Kofax Monitor's expanded dashboard capability now includes a remote dashboard card. A single dashboard can have a consolidated view of different Kofax Monitor server dashboards. Dashboard cards can be combined to provide a single dashboard view of different Kofax operating environments.





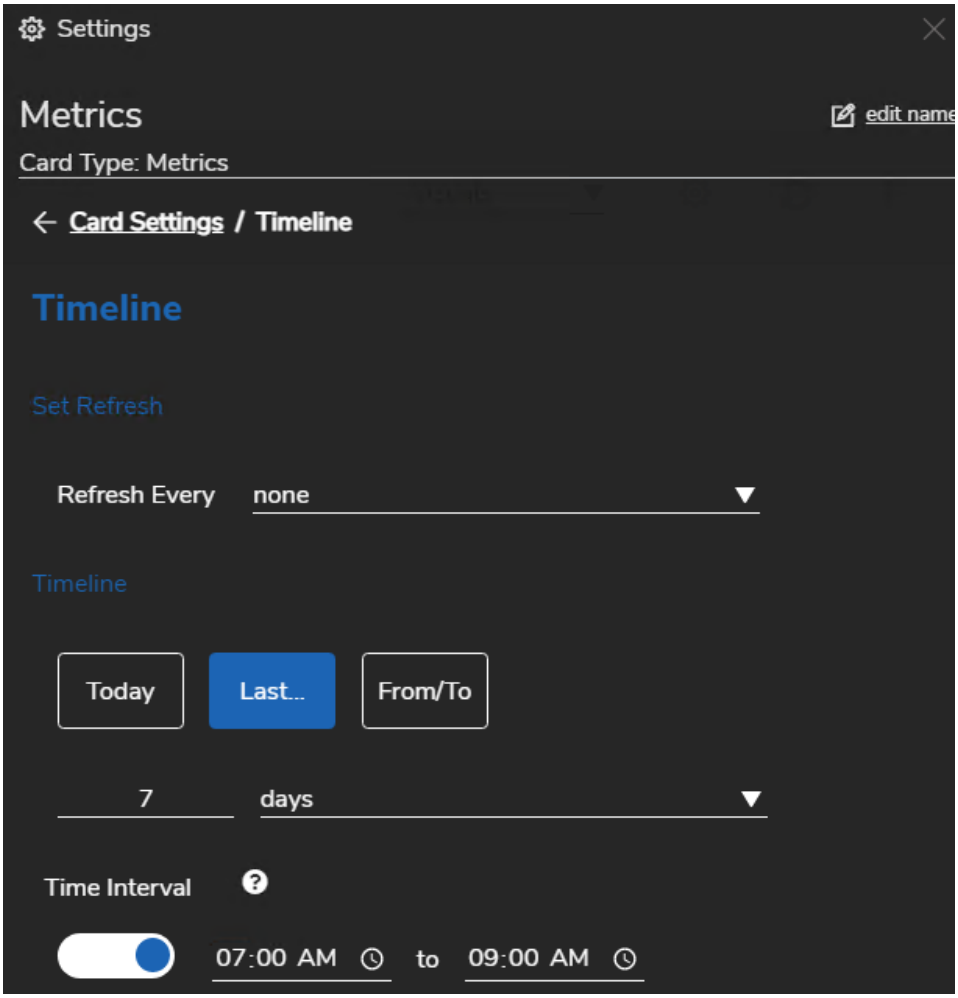
New Direct Monitor View Option

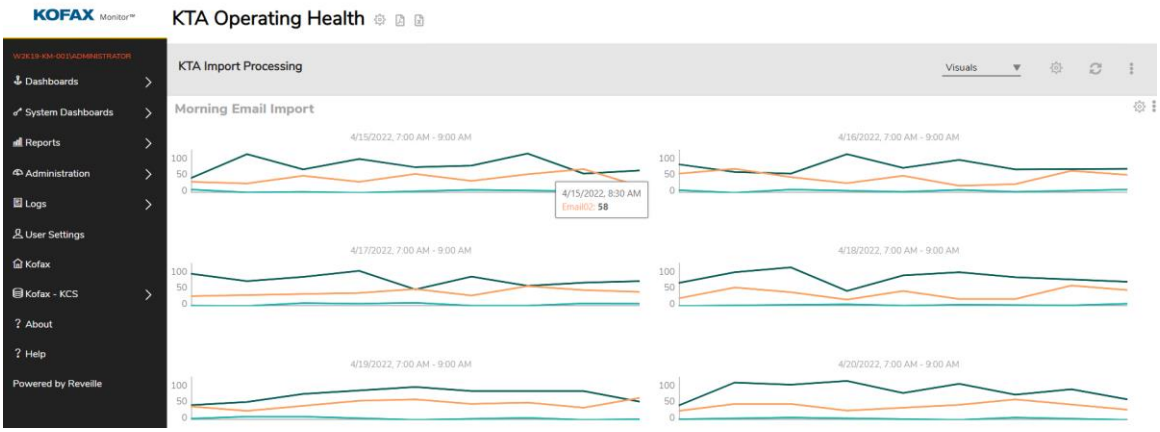
Kofax Monitors can now be viewed with authorized access from a direct URL link.



New Timeline and Small Multiples Chart Options

Kofax Monitor now supports dashboard metric card small multiples option to view data for only certain time intervals in a timespan. When setting the timeline as last X days or a from/to timeline, a time interval option is shown. This allows the data to be filtered to show data for only that time interval across the overall timespan.





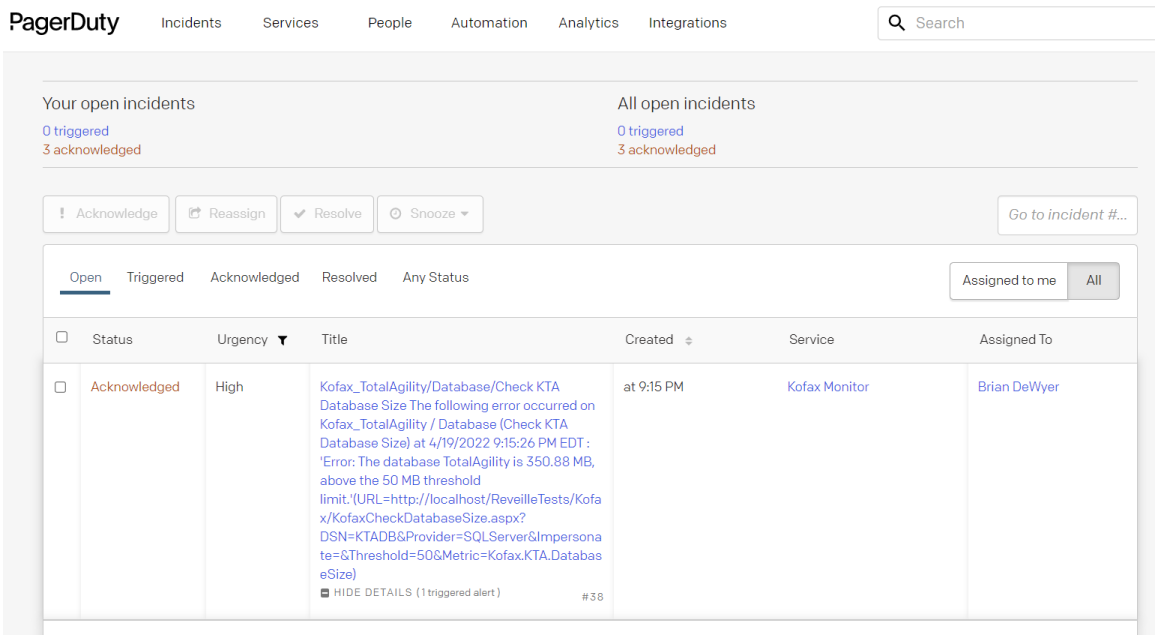
New Monitor Link option for Alert Notifications

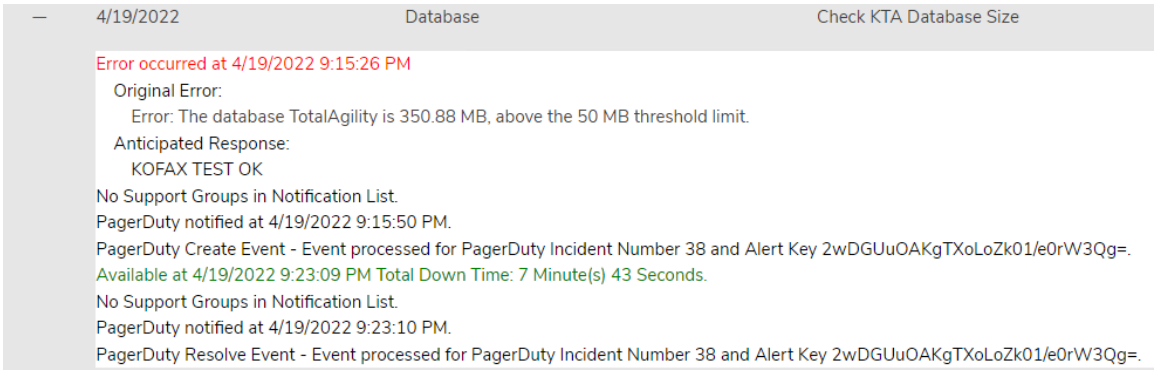
Enhanced AlertMessages.xml functionality with new monitor link variable. A direct monitor URL to the monitor in error state can be included with the alert notification information.

```
<ErrorMessage>

<![CDATA[<%=LocTheFollowingErrorOccurredOn%> <%=Monitor%> / <%=Resource%> (<%=Test%>) <%=LocAt%>
<%=ErrorDateTime%> <%=TimeZone%> :<%=CRLF%>'<%=Error%>'

        <%=CRLF%>View Monitor at: <%=MonitorLink%><%=CRLF%>]]>

</ErrorMessage>
```

PagerDuty Notification Support

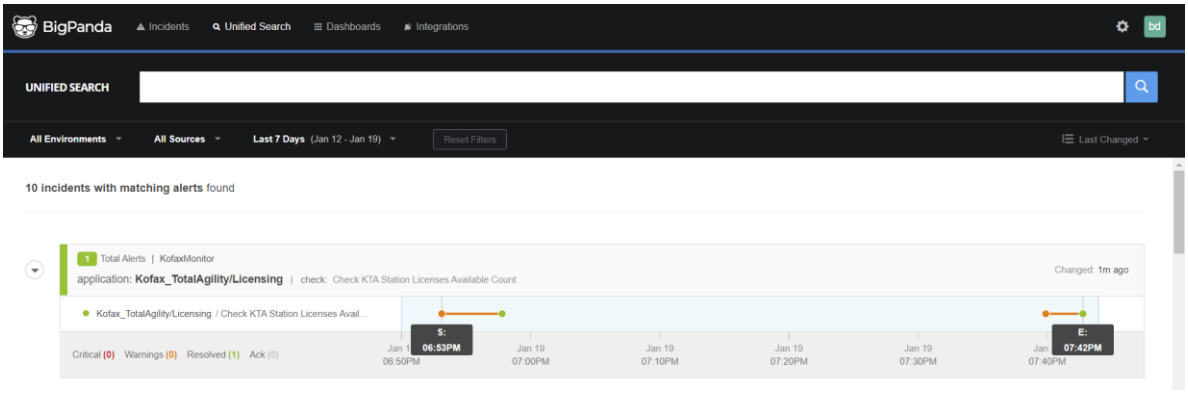
PagerDuty has been added as a new notification method. By leveraging bi-directional communication between Kofax Monitor and PagerDuty, incident and performance data is continuously and automatically synchronized between systems to minimize the disparate logging of incidents by email, spreadsheets, or logs and extend the value of automation initiatives.

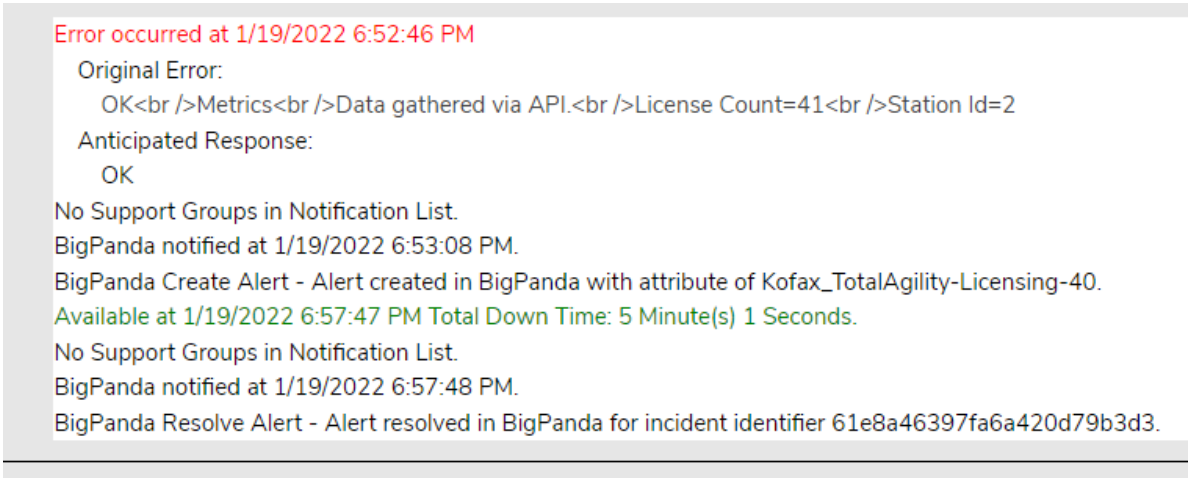




BigPanda Notification Support

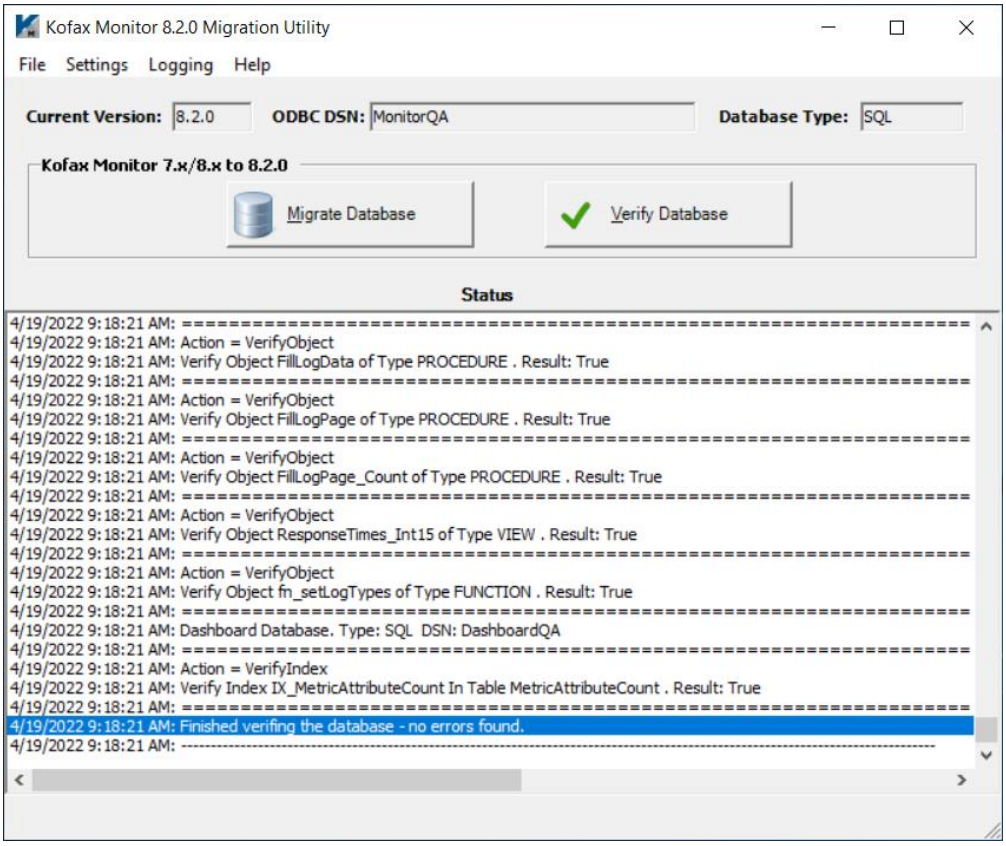
BigPanda has been added as a new notification method. By leveraging bi-directional communication between Kofax Monitor and BigPanda, incident and performance data is continuously and automatically synchronized between systems to minimize the disparate logging of incidents by email, spreadsheets, or logs and extend the value of automation initiatives.





Migration Utility

The migration utility updates a 7.x/8.x system to the 8.2.0 level. The migration utility should be run before upgrading an existing Kofax Monitor system to the 8.2.0 level.



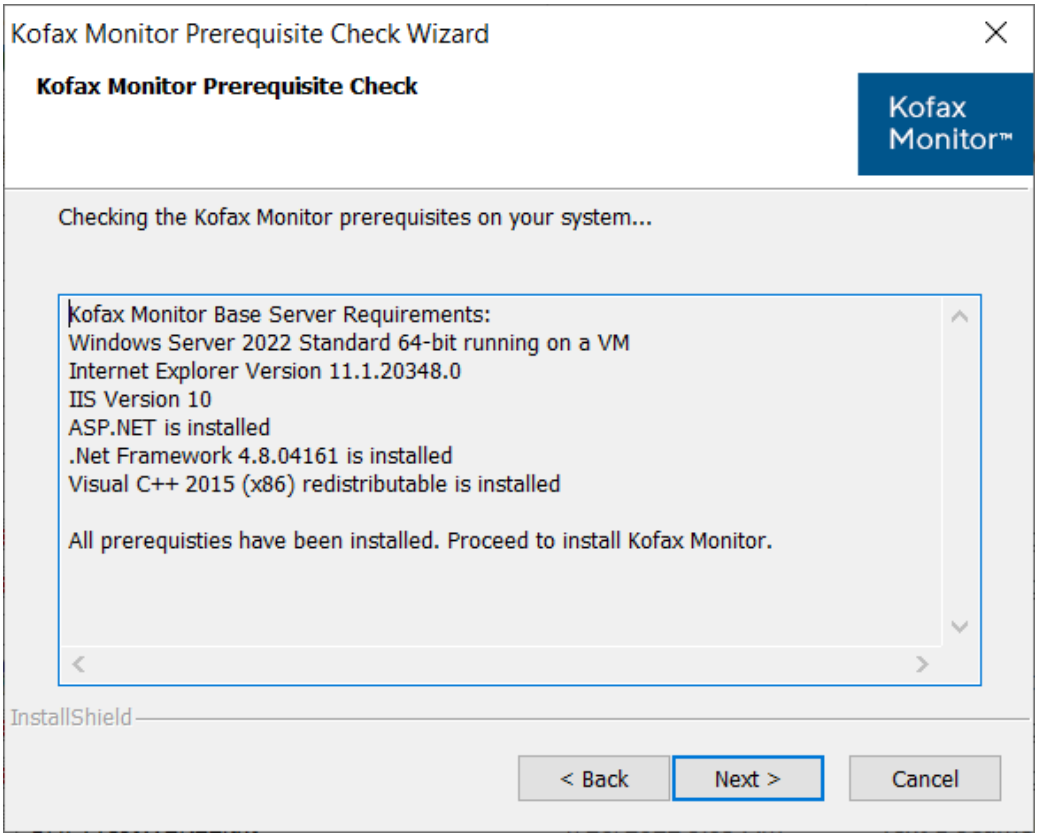
Kofax Product Currency

Support for:

- KC 11.1
- KTA 7.10
- KFS 4.3
- KCS 10.4
- KAFC 2.1
- KTM 7.0
- KIC 2.10
- VRS 5.2

Kofax Monitor Prerequisite Check

The Kofax Monitor Prerequisite check for the Kofax Monitor server has been enhanced to support the requirements for Kofax Monitor 8.2.0.



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Appendix A

Glossary

–A–

ASPX (Active Server Page) The file extension for .NET Active Server Page.

Advanced Grouping A multi-level grouping method enabling Monitors to be grouped and viewed logically. The groups inherit the status of the groups and Monitors within the group.

Alert A warning notifying the user that an error has occurred on a Resource.

Application Several Resources working together and monitored as one group. Monitors test applications.

Application diagram A window accessed from the Kofax Monitor Admin Console that graphically displays the application being monitored. Shows the relationships between Resources within an application.

–D–

diagram lines Lines that connect Resources within an application diagram to represent the relationships between Resources.

Docker Docker is a set of platform as a service products that use OS-level virtualization to deliver software in packages called containers.

–E–

ECM Abbreviation for *Enterprise Content Management*.

email list The list of employees sent email when a Monitor error occurs.

–H–

HTML5 Abbreviation for Hypertext Transfer Protocol revision 5. HTML5 is a markup language for structuring and presenting content for the World Wide Web and a core technology of the Internet.

HTTP Abbreviation for *Hypertext Transfer Protocol*.

–J–

JSR Abbreviation for *Java™ Specification Request*. Java Specification Requests are the actual descriptions of proposed and final specifications for the Java platform.

–K–

Kofax
Kofax provides solutions that streamline the flow of information throughout an organization by managing the capture, transformation and exchange of business-critical information arising in paper, fax and electronic formats in a more accurate, timely and cost-effective manner.

Kofax Monitor Admin Console
Kofax Monitor's Windows-based module that lets you perform system administration tasks such as starting and stopping monitors, creating and maintaining Monitors, running maintenance checks, and backing up databases.

Kofax Monitor User Console
Kofax Monitor's Web-based module that provides detailed information about Monitors in the system, such as Monitor results (response times and error messages) and summary reports. The Kofax Monitor User Console also lets you maintain on-call schedules and notifications.

–M–

Master Alert
Routing an alert to a Master Server, so you can notify anything defined at the Master Server, such as SNMP, Event Log, Page, etc.

Master Kofax Monitor Server (Master Server)
A full Kofax Monitor Server used to view the status and reports for all Monitors from the Remote Servers.

Monitor
A grouping of parameters and processes set up in Kofax Monitor and used to test the performance of an application. Monitors define how Kofax Monitor is to test an application, what constitutes an error in testing, and how technical support personnel are notified if an error occurs.

–N–

notification list
A list of support personnel who are notified when a Monitor error occurs.

–O–

OAuth 2.0
OAuth 2.0 is an authorization framework that enables applications to obtain limited access to user accounts on an HTTP service, such as ServiceNow, Microsoft 365, and Box. It works by delegating user authentication to the service that hosts the user account and authorizing third-party applications to access the user account. OAuth 2.0 provides authorization flows for web and desktop applications, and mobile devices.

Open Database Connectivity (ODBC)
A database standard that allows a database (and SQL statements) to access data from other types of databases.

–P–

proxy server
A server that receives all communications occurring between a client application and a server. It determines if it can complete the request. If yes, it answers the request. If no, it sends the communication on to the server.

–R–

Remote Kofax Monitor Server (Remote Server)
A small footprint non-IIS Kofax Monitor Server or a full Kofax Monitor Server which runs Monitors and reports status back to one or more Master Servers.

REST	Representational state transfer (REST) is a software architectural style that defines a set of constraints to be used for creating Web services. Web services that conform to the REST architectural style, called RESTful Web services, provide interoperability between computer systems on the Internet.
Report Card	A section on the SLA report, which compares the service level agreement parameters of the application being monitored with the actual function of the application.
Resource	An individual component which is being monitored or which is part of an application being monitored. Can be a Web server, Web site, network, etc.
Resource relationship	Defines the connection between Resources within a Monitor. One Resource relationship or many together can form the application being monitored.

–S–

Scenario	A recorded set of actions made by a Windows application, which can be compared and tested.
Server	Any computer, device, or resource used to manage network resources.
Service Level Agreement (SLA)	A contract that specifies a standard of systems availability between two business entities.
Service Level Analysis Report	Summarizes whether or not the application is meeting Service Level Agreement (SLA) specifications.
Slack	Slack is a popular cloud-based set of proprietary team collaboration tools and services.
SNMP	Abbreviation for *Simple Network Management Protocol*.
SOA	Abbreviation for *Service Oriented Architecture*.
support group	A team of support personnel that maintains a particular Monitor. Support groups are responsible for responding to Monitor alerts.

–T–

telecommunications network (telnet)	A method used to connect to a different computer/server in order to enter command statements.
Teams	Microsoft Teams is a popular cloud-based set of proprietary team collaboration tools and services.
Test	An action or response expected from a Resource (network, application, server, Web site, etc.) which defines if the Resource is functioning properly. Part of a Monitor.
Transformation Modules	Kofax Transformation Modules streamline the transformation of business documents into structured electronic information by automating the process of document classification and data extraction.

–W–

WSDL	Acronym for *Web Services Description Language*. Pronounced ‘wiz dull’.

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