

Kofax Transformation Modules

6.0.0

Release Notes



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Preface

This guide contains information about installing Kofax Transformation Modules and assumes that you have a thorough understanding of Windows standards, applications, and interfaces, as well as Kofax Capture.

This guide is for solution integrators who are installing Kofax Transformation Modules or who need a description of the installation procedures and requirements.

Kofax Transformation Modules consists of a set of components and either Kofax Capture custom modules or additional tools. In this document, the components are also referred to by their module or tool name, omitting the product name.

If you downloaded Kofax Transformation Modules from the Kofax Electronic Delivery site, you can extract the files from ISO file. Refer to the instruction on the Site. Or, you may have received Kofax Transformation Modules as a package that includes electronic media. In this guide, we refer to both the extracted files and the electronic media as the product files.

Related Documentation

In addition to this *Kofax Transformation Modules Installation Guide*, Kofax Transformation Modules 6.0.0 includes the following documentation.

Help

Help for Kofax Transformation Modules is available from the applications as follows:

- From any of the Kofax Transformation Modules components, press F1, click Help from the toolbar, or select Contents from the Help menu.
- From any application window, press F1 or click Help to display context-sensitive Help information for the window.

Help for Scripting

Information about scripting is available from the Help menu of any Project Builder interface that enables you to write or access scripts.

Note This Help is available in English only.

Training

Kofax offers both classroom and computer-based training that help you make the most of your Kofax solution. Visit the Kofax Web site at www.kofax.com for complete details about the available training options and schedules.

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.

Go to <http://www.kofax.com/support/> for:

- Access to product knowledge bases
Click **CAPTURE: SUPPORT KNOWLEDGE**
- Access to the Kofax Customer Portal (for eligible customers)
Click **CAPTURE: SUPPORT INTERACTIONS** and log in
To optimize your use of the portal, go to the Kofax Customer Portal login page and click the link to open the *Guide to the Kofax Support Portal*. The guide describes how to access the portal, 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.
- Product information and release news
Click **Product** and select a product name and version.
- Downloadable product documentation
Click **Documentation** and select a product name and version.
- Access to support tools
Click **Tools** and select the tool to use.
- Information about the support commitment for Kofax products
Click **Options** and select **Kofax Support Commitment**.

Introduction

This set of release notes contains important information not included in other Kofax Transformation Modules documentation. Please read these release notes carefully before you install, upgrade, or use this product.

Information about supported operating systems and other requirements is available on the Kofax Support website at www.kofax.com.

New Features

This release provides the following new product features.

Batch Filtering

With batch filtering, you can quickly find batches and take action. You can filter batches in the user interactive modules. You can filter by:

- Batch name
- Batch class
- Queue
- Status
- Priority
- Has error
- Station ID
- Batch creation date/time
- Scan station ID
- Scan user
- Batch field (not available if batches are stored in a Standard database).

Clustering

Input a set of unknown documents and get an organized set of known and grouped documents. You can then use these documents to train for classification, separation, and extraction. You can also turn these into golden files and use them when you perform benchmarks.

Document Review has Ability to Configure Thumbnail Size

In Document Review, a new option is now available to resize thumbnail images so that monitors with large resolutions are more efficient. If the option is selected, you can use a slider to overwrite the default size-settings of the thumbnail images. (SPR00109829)

Document Sets

A new document storage method is available that enables users to view, edit, and access their documents as required. There are several preconfigured document sets as well as custom document sets that you can add at any time. The predefined document sets are the two training sets, the Selection document set and the New Samples document set. Some of these sets are not always visible. The custom document sets can be used for testing and benchmarks.

Training Sets

When a project created in an earlier version of Kofax Transformation Modules, the old training sets are converted automatically. The new document set format means that there is a single set of training documents for classification (and separation if enabled) and another set for extraction. All class related information is part of the individual documents, so it is no longer necessary to separate the documents into separate training folders. You can however, organize the documents within the training document sets into separate document subsets. You can also exclude individual document subsets from training or set a subset to be the default document subset.

Combined Classification & Separation Training

When trainable document separation is enabled, those documents used for training classification are also used for training separation. This is because the same information used for classification is also valuable for document separation.

KADMOS Recognition Engine End-of-Life

The KADMOS recognition engine, developed by re Recognition GmbH, was available as a separately licensed option in earlier Kofax Transformation Modules versions. Kofax Transformation Modules 6.0.0 however, does not include the KADMOS engine.

Existing projects that currently have recognition profiles that use the KADMOS recognition engine in Kofax Transformation Modules 6.0.0 can still use that engine for this version. However, later versions of Kofax Transformation Modules no longer support the KADMOS recognition engine. This means that you need to modify your KADMOS profiles to use either the RecoStar or the ABBYY FineReader engine, as they are both installed by default with Kofax Transformation Modules.

Also, you should use either the RecoStar or the ABBYY FineReader recognition engine when creating any new recognition profiles.

Module User Profile Management

You can separate User Profile management from other administrative functions by allowing or restricting user and group access to the Administration module.

Project Builder

The following new features are available for Project Builder.

Independent Classification and Extraction Training

You can now perform classification and extraction training separately. Single buttons are available on the Ribbon to perform those actions independent from each other.

Shortcuts for Deleting Documents in Conflict Manager

Conflict Manager now has keyboard shortcuts to delete documents. You can also suppress the confirmation window to speed up the deletion of conflicting documents.

Setting the Start of a Table with a Dictionary

In Project Builder, you can now specify a start of table dictionary, just as you can set an end of table dictionary.

Updated User Interface

Project Builder has a new look and feel that was created to provide a more comfortable user interface with easy access to common operations. The default layout includes the Project Tree, the Details window, and the Documents window.

The Project Tree is a hierarchical view of a project and has everything at hand. All items added to a class are contained within the Project Tree, meaning that you do not have to switch views or open additional windows to see the class items at the same time. For example, fields, locators, and validation rules. To maximize space, classes and collection of class items are collapsible. This enables users to focus on a specific area of their project without other classes or items cluttering the view.

The Project Tree also has a search field that you can use to locate items in a project, including those hidden inside a class.

The Details window displays information about the item or items selected in the project tree and the Documents window displays all of the preconfigured document sets and any added custom document sets.

Additional windows can be opened and closed, and the default windows along with any additional windows can be arranged to best suit your needs. Individual windows can be floated outside the main application window, they can be pinned to a new location, or they can be arranged in tabs with other windows. You can also make one of the individual windows full screen or full screen on a second monitor. This flexibility enables users to make the most of their available screen space and working preferences.

Scripting

The following new feature is available for scripting.

Access to Document GUID in Script

The GUID of a Kofax Capture document is now available in script. GUIDs are available through the normal XDocInfo interface for documents, pages, and folders in script.

Thin Client Server

The following new feature is available for Thin Client Server.

Thin or Rich Client Identification

A new property (`CscProject.ScriptExecutionModuleType`) is available that indicates whether a rich client or a thin client module is running the script. (SPR00120842)

Thin Client Validation

The following new feature is available for Thin Client Validation.

DocumentLoaded Event Fired at Reclassification

A `ValidationForm_DocumentLoaded` event is now fired when a document is reclassified. (SPR00090723)

Unstructured Document Extraction

Using the new Text Content Locator, it is now possible to extract data from documents that have no consistent layout. Unlike other locators, the Text Content Locator is configurable only by adding documents to the extraction training set, lassoing the desired content, and then training the project. For the best results, the more training documents available, the better the extraction results. However, as the number of training documents increases, the time it takes to train the project also increases. To ensure that the number of training documents does not hinder project maintenance, set a maximum number of training documents, and regularly test your extraction results.

Kofax Reporting Support

Kofax Transformation Modules now supports the Kofax Reporting platform to report statistical data during batch processing. This enables you to know information about the processing time and accuracy of a batch, as well as other information to control your business process. You can create different types of reports based on your organizational requirements.

Changes in Behavior

The following features function differently than they did in previous versions.

Batch Routing

The following change has been made to batch routing.

Child Batches Indicated in Logs

Logs now indicate when child batches are created during batch routing.

Invoice Evaluator Renamed

The Invoice Evaluator is renamed to Advanced Evaluator and the usage is no longer restricted to invoice projects.

Knowledge Base Administration Tool Removed

With the new version, the Knowledge Base Administration tool is no longer provided. You can update the project for online learning data and create knowledge bases using Project Builder.

Licensing

The following change has been made to licensing.

Thin Client Modules Added to the License Utility

Thin Client Correction, Thin Client Verification, and Thin Client Validation are now listed in the Project Builder License Utility. (SPR00092377)

Project Builder

The following changes were made to Project Builder.

Number and Position of Documents No Longer Available

The documents in a document set are no longer numbered. (SPR00111296)

Getting Started Screen

When you first start Project Builder, the Getting Started screen contains buttons for creating a new project or opening an existing one. You can also open a project you previously opened from the Recent Projects list. A list of new features appears on the right side.

Project Builder Shortcut Keys

There are new and changed shortcut keys in Project Builder available to process your documents. For detailed information, see *Project Builder Help*.

Limits to Project Descriptions

Project descriptions are limited to 2,000 characters.

No Distinction Between Invoice and Standard Projects

In Project Builder, there is no longer a distinction between invoice and standard projects. You can configure any standard project to provide invoice functionality, such as trainable group locators, knowledge bases and online learning. During production the activated license determines whether the configured project can be processed.

Project Statistical Information No Longer Available

There is no longer information available about the following in the Documents window:

- Number of documents in a document set
- Number of documents per class in a document set
- Number of min/max page limit per class

Recall Table Extraction Caused Line Items to Repopulate in Document

On the Project Settings Validation tab, a new option is available that allows to turn off automatic re-extraction of empty tables in Validation. If selected, re-extraction happens, which was the default before this change. If cleared, re-extraction of empty tables in Validation is turned off. (SPR00105227)

Rotation Message Option

Users are now able to hide subsequent messages informing them that all OCR data is lost. (SPR00119933)

Train All Pages for Content Classification

When training a multi-page document for content classification, all pages can be added to the training set at the same time.

Project Planner

Project Planner is no longer provided with Kofax Transformation Modules. Its functionality has been merged with Project Builder. If you are upgrading from Kofax Transformation Modules 5.5 to 6.0, uninstall Project Planner manually as shown in the *Kofax Transformation Modules Installation Guide*.

Recognition

The following change was made to recognition.

Bar Code Recognition

The ABBYY bar code reader was updated to improve Data Matrix and QR Code recognition and automatic orientation detection.

Simplified Classification Configuration

A top-level content classifier and a single project-wide layout classifier have replaced the old views, significantly simplifying classification configuration.

Subtree Classification

Subtree classification is now enabled via the Class Details. Additionally, configuring the Subtree Classifier for a class is also configured in the Class Details.

TDS Page Classifier

When Trainable Document Separation is enabled, the TDS Page Classifier is now configurable on the Project Settings - Document Separation tab. This page classifier is used for separation, yet uses the training documents in the classification training set.

Server

The following change was made to Server.

Numbers of Used Licenses and Pages Appear in the Log

The server log now lists the number of licenses and pages that are decremented during batch processing.

Synchronization Tool

The following change was made to the Synchronization Tool.

Indicator for Invalid Classification Results

Classes that are not accepted as classification results are indicated with an icon.

Table Locator

The following change has been made to the table locator.

Reporting Table Model Errors

When reporting table model errors, such as removing a column, the correct column name appears in the error message.

Validation Form Designer

The following change has been made to the validation form designer.

Ignore Case Moved with Auto Complete

The Ignore Case option has been moved so that it is in a group with Auto Complete because they are related options.

Resolved Issues

The following issues that were reported for a previous version of the product were fixed in this release.

General

The following general problems have been resolved.

Enable LargeAddressAware to Reduce Errors

The `LargeAddressAware` flag was enabled to support a larger address space, process larger batches, and reduce the risk of out-of-memory errors. (SPR00096065, SPR00109732, SPR00114803)

A2iA Zone Locator

The following problems were resolved for the A2iA Zone Locator.

A2iA Fails with Images for French Checks

When French checks that have more than one page are processed with the A2iA CheckReader, A2iA no longer fails with an error. (SPR00111701)

A2iA Locator Not Returning Payee Name in Preset Fields

When the A2iA Zone Locator is configured for the Check Reader, it is now returning the correct `PayeeName` subfield value. (SPR00086770)

Performing Arithmetic Operation Resulted in Overflow Error

With the A2iA Zone Locator, the processing of images no longer fails with an error. (SPR00074822)

Processing Checks Generates Error

If the country configuration of the A2iA CheckReader does not match the currency or check image configuration, a timeout occurred. This behavior of the A2iA OCR Engine is as designed. The timeout has now been decreased from 10 minutes to 1 minute and there is a more descriptive error message displayed when this occurs. (SPR00074779)

Advanced Zone Locator

The following problems were resolved for the Advanced Zone Locator.

Anchor Settings Cause Exceptions

If anchor settings are used and a test document has fewer pages than the sample document, Project Builder and Server are closed and display an unhandled exception. This has been fixed. (SPR00113531)

Error when Creating Background Removal Info

When creating Background Removal information using the Advanced Zone Locator, a FoX Exception error is no longer generated. (SPR00074319)

Index Out of Range Error

An index out of range error is no longer generated on specific images. (SPR00075242)

Merged OMR Zones Generates an Exception

Merging the output of OMR zones in an Advanced Zone Locator into a single subfield, no longer generates an error and the zones are now merged correctly for OMR. (SPR00092238)

Returning Fields with Negative Heights

Using Dynamic Zone Adjustment in an Advanced Zone Locator no longer returns negative width and height values for zones. (SPR00092264)

Unmapped Zones Cause an Error

When an Advanced Zone Locator had unmapped zones, this now initializes registration, and an error is no longer generated. (SPR00108555)

Zones Shift and Cause OCR Misreads

Using Dynamic Zone Adjustment in an Advanced Zone Locator no longer returns misplaced zones. (SPR00093426)

Amount Group Locator

The following problems were resolved for the Amount Group Locator.

Finding Second Tax Amounts

The Amount Group Locator did not find second tax amounts if more than two taxes are defined in the country settings. If you define more than two tax rates for the Amount Group Locator for a country, it now considers all combinations of tax rate pairs. The assumption is that there are no more than two different tax rates printed on a document. (SPR00122069)

Joined Values for a Single Value

During training, the distances to neighboring words are calculated and stored in the trained field. This information is later used during extraction and the field extension or join to the left or right never goes over the smallest distances found during training. As this distance information is stored in the knowledge base, knowledge base files become incompatible. If the user creates a knowledge base (or a trained project) after this fix is applied to the system, such a knowledge base (or trained project) cannot be used on systems without this fix. Knowledge bases created before this fix can be used on systems that have the fix applied. (SPR00101874)

Batch Routing

The following problem has been resolved for batch routing.

Error Closing Parent Batch with Rejected Document

Closing a parent batch that contains a rejected document no longer causes a RejectBatch error. (SPR00115396)

Correction

The following problems have been resolved for Correction.

Batch Cannot Be Processed if Field Coordinates Too Large

If one or more field coordinates are too large, an error occurred that prevented the batch from being processed. Sizes are now adjusted before a snippet is cut from the main image. (SPR00093330)

Out of Memory Error

The Correction module no longer consumes increasing amounts of memory. (SPR00120644)

Document Review

The following issues have been resolved for Document Review

Classification and Extraction Results Lost During Document Routing

In Document Review, classification and extraction results are no longer lost when reordering pages in combination with moving documents to child batches by using Document Routing. (SPR00109004)

Classification Lost when Combo Box Classification Selected

When selecting a value in the class combo box, the value is retained and classification is no longer lost. (SPR00095041)

Copy and Paste Document Causes Error

A missing check in initialization of the GUI element was fixed. (SPR00102883)

Delays During Split or Merge

For all batch editing actions in Document Review, the latency is now significantly reduced. (SPR00114593)

Deleted and Page Index Incorrect

In both Batch_BeforeDeletePage and Batch_AfterDeletePage, the value of the deleted page index was incorrectly assigned as the document global index. This problem has been resolved. (SPR00109563)

Display Issues for Dragging and Dropping

When dragging and dropping page thumbnails between documents, the pages are no longer out of sync with the thumbnails. (SPR00114927)

Document Split or Paste Page Suspends Module

When activating high availability for Kofax Capture, a split, a copy, or a paste page action now works without suspending Document Review. (SPR00106520)

Focus Moves to Next Problem when Automatic Navigation Enabled

In the Project Settings the options for automatic navigation in Document Review have been changed:

- Disabled. (No auto navigation. This is the new default.)
- On confirm only. (Behavior in previous versions.)
- On confirm, change class or override. (Automatic navigation happens when the action fixes a problem. This also applies to custom script commands.)

Select the option that applies to how you want to move the focus. (SPR00108623)

Image Rotates Twice when Configured to Rotate in XDocument

When a project is configured to rotate documents in the XDocument, documents are no longer rotated twice. (SPR00115196)

Longer Batch Loading Time

Batches with multi-page documents or a large number of documents no longer require as much time to open in Document Review. (SPR00108232, SPR00112998)

Memory Leak in Document Review

In combination with additional memory clearing, the memory usage of the module is now enhanced. (SPR00114895)

Property not Marking Documents Modified

Using the `SetIsUnconfidentClass()` method did not set the modified flag for a document. The modified flag is now set when the unconfident value changes, instead of waiting until a class is confirmed. (SPR00116296)

Selecting Multiple Documents and Confirming the Last Problem Error

Any problems in Document Review when you multi-select documents and confirm the last problem in a batch are now resolved. (SPR00115876, SPR00148099)

Numeric Keypad not Working in Document Review

For the a document type, you can type now in the drop-down list a name that contains also numbers, by using the numeric keypad as well as the standard portion of the keyboard. (SPR00094002)

PreviewMouseLeftButton Error

This error no longer occurs. (SPR00114852)

Prompt to Save Classification Result when Closing Batch

This is fixed by forcing the drop down list to close and the editable text box to lose focus, when the user selects Close Batch or Suspend Batch; the changed class then needs to be accepted before the batch is actually closed. If the change introduces a new Document Review problem, the user gets informed accordingly and can cancel the closing of the batch. (SPR00075673)

Sorting Date Columns

The ability to sort batches by date in the Open Batch window of Document Review is now working again. (SPR00096750, SPR00107809)

Synchronizing Project and Customization Files

The project .fpr file and customizationDR.xml were not correctly synchronized, which prevented some Document Review menus from appearing and caused errors. This problem was fixed as part of corrections to handling customization. (SPR00091135, SPR00106249)

Thumbnail Setting Incorrect Language is German

The thumbnails were not the correct size when the application language was changed to German. The number conversion has been fixed so that the thumbnails are set to the desired size. (SPR00112300)

Documentation and User Interface

The documentation and user interface was updated to resolve the following SPRs:

- SPR00057902: Explained behavior of scripts in a classification locator.
- SPR00071340: Added explanation about when polling is disabled in Knowledge Base Learning Server.
- SPR00085717: Explained when a `ValidationForm` object is available.
- SPR00089700: Corrected spelling in a Project Builder error message.
- SPR00089703: Corrected error message indicates if the database type is not supported.
- SPR00089908: Corrected the example for “Match Function” in Scripting Help.
- SPR00090134: Added Russian translation for the Edit label in Toolbars.
- SPR00091071: Corrected information in “Modules that Support Scripting.”
- SPR00091072: Corrected information about Configuration.
- SPR00092141: Added IIS information that ASP.NET Impersonation needs to be disabled.
- SPR00092142: Advanced Zone Locator OMR test uses always the sample image and not the selected test image.
- SPR00092532: Documentation added for configuring custom rejection notes in Validation.
- SPR00092646: Added missing regular expression parameter.
- SPR00093238: Validation Help includes all shortcut keys.
- SPR00093889: Corrected server events batch processing diagram.
- SPR00093924: Corrected information about default values populated in `xValues`.
- SPR00094287: Corrected information about the `ListOfBatchesMaxNumber` property for the Thin Client.
- SPR00094989: Updated feature documentation.
- SPR00095147: Updated minimum roles and permissions when using a relational database.
- SPR00097544: Sample code provided for `BeforeTableCellComboBoxDropDown`.
- SPR00097546: Fixed sample code for `BeforeComboBoxDropDown`.
- SPR00102615: Added information that Thin Client supports load balancing.
- SPR00103044: Corrected script documentation about valid queues for routing batches.
- SPR00103586: Added documentation about permissions.
- SPR00104717: Clarified terminology about benchmarks.
- SPR00106529: Corrected information about the “Purchase Order Item Number.”
- SPR00107110: Added explanation for invoice group locators.
- SPR00107646: Added new topic that discusses bar code confidences and options on how to eliminate unwanted bar codes.
- SPR00108576: Clarified information about dependent locators.
- SPR00109302: Clarified information about dictionary updates.
- SPR00112125: Batch Settings window includes missing German translation.
- SPR00114199: Updated information about structural anchors in Advanced Zone Locator.
- SPR00114431: Improved Thin Client documentation to include information about multiple validation steps.
- SPR00115400: Corrected example for combining documents with the same policy number in one folder.

- SPR00115661: Corrected classification example.
- SPR00116941: Corrected information about the Dock Viewer command.
- SPR00120923: Added information about configuring Statistics Export to the *Kofax Transformation Modules Installation Guide*.
- SPR00122655: Corrected information about the RecoStar dictionary.

Export Connectors

The following problem was resolved for export connectors.

Support for Multiple Instance Export with Statistics Export Connector

The Kofax Transformation Modules Statistics export connector may be run in single-mode or multi-instance mode if the flag `SupportMultipleInstances` is equal to `False` or `True` respectively in the corresponding `.inf` file. The Statistics export connector must be installed in the same location as Kofax Transformation - Server. (SPR00115519)

Extraction

The following problems were resolved for extraction.

Amount Group Locator Extracts Wrong Currency and Ignores Regions

When finding the currency, only currency candidates within the allowed regions are now considered. (SPR00112871)

Calling Mixed Print from Script Produces Corrupt Words Collection

The text representation on a XDocument is now consistent after rotating a page via OCR. (SPR00104950, SPR00115902)

Exclusion Database No Longer Works Correctly

The Database Locators exclusion database feature now works as expected. (SPR00108936)

Note If the exclusion database file was created in a Kofax Transformation Modules version prior to 5.5, a re-import is necessary so that the fix works.

Field Threshold Ignored

When the field threshold has a distance of 0, alternate results are no longer available when there is only one top alternative. (SPR00091471)

Index Group Locator Caused Error

An error no longer occurs when an index group locator was set up to look on all pages and a knowledge base was trained on all pages. (SPR00119490)

Rereading Images

When a color image needs to be reread, a bi-tonal version of the image is created and used instead of the color image. (SPR00111240)

Unexpected Behavior for Own Address Database

When using your own address database for a database locator, extraction now returns the correct results. (SPR00102331)

Installation

The following problem was resolved for installation.

Installation Resets Service User Credentials

New silent install parameters are now available to set the user name and password for the Server Scheduler and Knowledge Base Learning Server services during the Kofax Transformation Modules installation. (SPR00113522)

Knowledge Base Learning Server

The following problems were resolved for the Knowledge Base Learning Server.

Not Logging out of Kofax Capture

When you stop the Knowledge Base Learning Service, it terminates and logs off correctly now, similarly to the behavior of the Knowledge Base Learning Server application. (SPR00116365)

Not Picking up Batches with User Profiles Enabled

This problem has been resolved by correcting a wrong registry key name in the Knowledge Base Learning Server. (SPR00087038)

Stability and Memory

Some memory consumption problems are now resolved for Knowledge Base Learning Server services. (SPR00116471, SPR00116472)

Stops Processing Batches with Project Load Error

Too many external knowledge bases, used by the group locators, could cause high memory consumption in the Knowledge Base Learning Server and exceed the maximum of 3 GB. As there is no need to load external knowledge bases in Knowledge Base Learning Server, they are no longer loaded. (SPR00103046)

Kofax Capture Integration

The following problems were resolved for Kofax Capture integration.

Batch Routing Not Functioning with Incorrect Kofax Capture Version

The problem that batch routing was not executed even though the correct Kofax Capture version was installed is now resolved. (SPR00120956)

Encoding Issues with Storing and Copying Strings

The UTF7 encoding for CustomStorageStrings (CSS) has been removed. All new batches are now processed without UTF7 encoding for CSS. All existing batches are processed with UTF7 encoding. (SPR00039938, SPR00102171)

If you want to keep the old behavior, use the new registry key "UseUTF7EncodingForCSS"="1", and the UTF7 encoding remains for new batches. Create this registry key on all machines running the server module before creating any new batches:

- For 64-bit operating systems: HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Kofax\Transformation\4.0
- For 32-bit operating systems: HKEY_LOCAL_MACHINE\SOFTWARE\Kofax\Transformation\4.0

Opening/Closing Batches when Converting Kofax Capture IndexFields to XValues

This fix affects all Kofax Transformation Modules. By introducing a new setting in the Synchronization Tool, the population of index fields in script can be suppressed. Only mapped fields are then loaded from Kofax Capture, and index fields are no longer available in script via XValues. The default of this setting for Kofax Transformation Modules 5.5 is "true" for all existing batch classes, and all index fields are populated in script, this is the same behavior as before. For all new batch classes the setting is set by default to "false." This setting is only available for Kofax Capture 10 Service Pack 2 and later, because a Kofax Capture fix is needed for this issue. For all other versions, this setting is not available. (SPR00109354)

Memory and GDI Leak of Batch Open Dialog

GDI consumption of the Batch Open window is now solved, and a lot of memory clearing is introduced. (SPR00118532)

Respect Batch Priority Across Server Instances 1 and 2

Batches processed via scheduler are now processed in the correct order based on their priority and instance order. (SPR00088396)

Setting Field Confidence Higher than Kofax Capture Generates Errors

Scripts that use complex settings for field confidence level can cause stack trace errors and non-functional module errors, especially when the field confidence level for Validation is set

higher than Kofax Capture. Make sure that your scripts set the field confidence level instead of adding confidence to a field, and perform a check to make sure that field confidence level is not too high or too low. (SPR00089160)

Project Builder

The following problems were resolved for Project Builder.

Adding New Fields to a Validation Method

Adding a new field to a validation method no longer closes Project Builder. (SPR00091831)

Address Exclusion Database of Vendor Locator Cannot Handle Non-Numeric Values

The Address Exclusion Database feature of the Vendor Locator now works with non-numeric values like "ABCDEF" for vendor IDs. (SPR00092199)

Breakpoint Prevents Debugging

If a breakpoint was added for debugging, stopping Project Builder no longer generates an error or crashes. Now, the Show Script button is always enabled and Activate Script Debugging is not enabled when testing Validation. (SPR00091268)

Cannot Resolve Training Conflict in Project Builder Error

The conflict management dialog could not handle either inherited or deleted fields, and created a stack dump saying "The given key was not present in the dictionary." This means that the conflicting field did not exist in the list of fields in the class. Now the list and the conflict information are updated correctly. (SPR00109995)

Cannot Train Fields for Group Locators Behind a Derived Evaluator

A project with a two-level class structure, such as a standard evaluator in the base class and a group locator in the inherited class, no longer prevents training of the corresponding fields for this group locator in the inherited class. (SPR00093467)

Changing Group Name in Field Properties Does Not Update Training Panel

Updating the group name in the field properties did not update the name in the Training Panel. Users had to restart Project Builder for the change to take effect. Updating the group name now updates the name in the Training Panel correctly. (SPR00070991)

Conflict Management Issues

After documents are adjusted in the conflict resolution window and the project is retrained, the user is no longer asked to adjust the documents a second time. (SPR00115184)

Database Evaluator Failed with a Shared Violation Error

Now, when the automatic update option from the database is used, an error no longer occurs. (SPR00118258)

Display of Color Images

Several issues with color image handling have been resolved. (SPR00108580, SPR00111726)

Editing Search Masks Does Not Change Project Save Status

When you edit the search masks for a database locator, the project save status changes to remind you to save your work. (SPR00107661)

End-of-Table Dictionary Not Working for Trainable Tables

The end-of-table dictionary is now supported for trainable tables. (SPR00094409)

Error on Mixed OCR with RecoStar

MachinePrint and HandPrint detection no longer corrupts memory or generates errors. (SPR00105238)

Error Running Table Locator for an Image

Running a table locator on an image no longer generates a "The execution of a locator method failed." error. (SPR00093221)

Extraction Benchmark Crashes When Using pXDoc.Reclassify

Reclassification is now properly supported for child classes in the extraction benchmark. (SPR00115424)

Formatted Text Cannot Be Set to a Blank String

If a script formatter set the `FormattedText` to a blank string, the field kept the original text. Now, `FormattedText` accepts blank values. (SPR00087280)

Fuzzy Database Search Unhandled Exception

There is no longer an exception when doing a fuzzy database search from a script. (SPR00093447)

Incorrect Field Formatting Inheritance

Field formatting was not correctly inherited by a child class from the parent class. Now, when adding a child class, fields are assigned to the locator from the parent class. In a child class, you can select `Inherited` or `None` to specify which format to use. (SPR00115216, SPR00115217)

Manual Table Locator Does Not Find Optional Cells

There is no longer a problem finding optional table cells. (SPR000121095)

Memory Not Released after Separation Benchmark Execution

After processing a separation benchmark for a large set of documents, memory usage remained high and affected Project Builder. Memory is now released correctly. (SPR00092219)

Multi-Script Rule Ignores New Text Field Value

A multi-script rule ignored a new text field value. If a document representation is added with `oRepresentation.Zones.Append`, the parameter that controls the field text controls is now reset when the complete content of the field is filled. (SPR00092973)

Validation Forms Cannot Be Edited

Previously, validation forms could not be edited after a table model was renamed. Changes are now properly updated to the validation form so that it can continue to be edited. (SPR0091832)

Vendor Locator Returns Wrong Results

The vendor ID, returned by the specifically trained Invoice Group Locator (IGL), is searched in the vendor fuzzy database to get all information (vendor name, account number, and so on). However every field from the database that matched this number was also considered as valid, adding wrong results. Moreover, the confidence from the alternative found and added by the IGL was not the confidence from the vendor ID field from the IGL. Now the Vendor Locator no longer returns incorrect results and confidences. (SPR00092578)

Note This fix only applies when using databases that were created or imported in Kofax Transformation Modules version 5.0 and later.

Wrong Line Item Picked Up by Line Item Matching

Processing an invoice through Validation with a Line Item Matching produces inaccurate results, such as picking up the wrong line item or returning a single line item as two lines. This was caused when a total was found on an invoice, but the amount was ambiguous. Matching now performs additional checks so that multiple records are not returned. (SPR00079979)

Recognition

The following problems were resolved for recognition.

Error Loading RecoStar Dictionary

An error occurred when assigning a dictionary to a RecoStar recognition profile and then copying a project to another computer. The problem was fixed by allocating more memory to uncompress dictionary data. (SPR00093264)

Recognition Failed to Obtain EBC License

Recognition failed to obtain an EBC license if the Scan or Quality Control module was running on another workstation. Recognition now acquires and holds the license for the duration of the process. (SPR00054896)

Scripting

The following problems were resolved for scripting.

After Field Changed Event Not Fired

The `ValidationForm_AfterFieldChanged` event was not fired when a user clicked on a word in a document. This has been fixed so that the event is fired correctly. (SPR00047064)

Prompt to Save Changes when Exiting

When you close the Script Resources window, you are prompted to save your changes. (SPR00090670)

Server

The following problems were resolved for Server processing.

Cannot Delete the First Page of a Merged Document

When using the `Batch.MergeDocuments` scripted batch restructuring method and deleting the first page of the merged document with `Batch.DeletePage`, batches are no longer sent to Quality Control with an error. (SPR00114502)

Combined `Batch.AddPage` and `Batch.PageMove` Commands Delete XDocument

The combination of these two actions no longer fails. (SPR00092301, SPR00115525)

Corrupt Dynamic Specific Knowledge Base Causes Batches to Fail

When the Knowledge Base Learning Service terminates abnormally while saving the specific dynamic knowledge base, the dynamic knowledge base is no longer corrupted. (SPR00116262)

`CscSQLDataTable.CreateQuery()` Causes Significant Delay

The synonyms queries are expensive and most of the time not needed when using tables or views. Fixed issue by separating query for columns into multiple steps. (SPR00116410)

Database Locator Best Result Returned

A new option for Database Locator is now available. This option allows database operations to focus on precision rather than on speed. (SPR00113840)

Document Separation Executed Before Batch Open Event

Documents created in the `Batch_Open` event were ignored for the following document separation. A document created in the `Batch_Open` event now is separated if the server is running in instance 1, a project has document separation activated, or document creation happens in the batch open event directly before executing separation. (SPR00092341)

Error Appears in Server Scheduler Log When Starting and Stopping Server

An error no longer appears in the Server Scheduler log when starting or stopping the Kofax Transformation Modules Server. (SPR00114509)

Error Indicates Locator Method Failed

The Vendor Locator is now able to properly handle a remote fuzzy database for the Database Locator, and also for the address exclusion database. (SPR00096696)

Page Rotation Changes Image to Bitonal

Rotating a page in trainable document separation changed the image on disc to a black and white version of that image. The original color mode of the image is now left unchanged. (SPR00106742)

Performance Issues with Large Numbers of Waiting Batches

Completely removed the transfer of the batch count from the Server Scheduler communication, it is not needed for the logic of the load balancer, can be completely handled inside the partition manager. (SPR00119282)

Performance Issues with Regular Expressions

Code that is used to compare dictionary hits on different pages was optimized to improve performance. (SPR00095181)

Performance Issues with Server Scheduler

Performance issues are no longer reported by Server Scheduler after upgrading Kofax Transformation Modules. When processing around 250 batches, the Server Scheduler service no longer gets into a state where the current batch is suspended and single batches are processed, one at a time. (SPR00089079)

RecoStar Fails to Process Certain Images and Causes Errors

With the integration of a fix from RecoStar, this issue is no longer a problem. (SPR00075871)

Second Server Instance Always Performs Extraction

The second Server instance was always re-extracting documents that were already extracted and validated. This is no longer the case. (SPR00075242)

Unavailable License Server

When the License Server is unavailable, an error message is displayed. An unavailable License Server no longer causes modules to fail. (SPR00092616)

Validating an Oracle SQL Database Containing Synonyms Caused Delays

The check is not done in a few steps and searching synonyms is the last resort if the object name is not found in tables or views. This improves the performance on some database setups with Oracle. (SPR00116757)

Synchronization Tool

The following problems were resolved for the Synchronization Tool.

Memory Leak During Repeated Synchronization

Repeatedly synchronizing a large project no longer causes unnecessary memory usage while Kofax Capture Administration is open. Therefore, Kofax Capture Administration is no longer terminated by a memory leak. (SPR00107417)

Synchronizing Large Projects

Processing has been changed so that large projects can be synchronized without error. (SPR00113687)

Thin Client Correction

The following problem has been resolved for Thin Client Correction.

Values Inherited for Blind Double Keying Fields

When performing blind double keying, the value of the first field of a document is also accepted in the first field of the next document. This was fixed so that the values of a document are removed for the next document. (SPR00101985)

Thin Client Validation

The following problems have been resolved for Thin Client Validation.

Child Batch Created by Routing Is Not Available in Thin Client

The initialization for new batches created by document routing for batch filtering functionality in Thin Client was missing. The fix only applies to document routing to batches within the same batch class; routing to a new batch class already worked as expected. (SPR00092400)

Database Lookup Generates Error

Selecting a value from the database using Database Lookup generated a “Value does not fall within the expected range” error. Database Lookup has been fixed so that the complete record set is populated, and there are no invisible columns with unavailable data. (SPR00092525)

Old Text Validated

When selecting an item in a combo box during validation, the old text was validated instead. Processing was changed so that a change in a combo box is properly updated. (SPR00120300)

Validation

The following problems have been resolved for Validation.

Batch Deleted when First Export Connector Succeeded and Second Failed

All Kofax Transformation Modules are now checking the document count when opening the batch. The batch is closed and forwarded to the next module when the document count is zero. (SPR00107982)

Buttons Overlap

In the Open Batch window in the Validation module, the OK and Cancel buttons are no longer truncated when using the Japanese Language Pack. (SPR00074714)

Combo Boxes that Require Capital Letters Reset Cursor Position

When the “Always CAPITAL letters” option in the Field Details window is selected, and the combo box behavior is set to allow free content, the cursor position is no longer reset with every key press. (SPR00095867)

Combo Boxes Not Loading Dictionary Files Correctly

If several classes contain combo box fields with identical names on the validation form, the dictionary files are now loaded correctly. (SPR00075482)

Database Lookup Functionality for Fuzzy Searches Causes Error

A network problem no longer causes an error with the fuzzy index file, and Fuzzy Lookup searches are no longer prohibited for any subsequent batches. (SPR00093322)

Database Lookup Search Results in Mismatched Data

When a database with empty columns is used for a database lookup, the selected record is now correctly placed in the mapped fields. (SPR00123332)

Delete Key Did Not Work in Validation

The Delete key and other keyboard shortcuts now work in Validation forms whether the toolbar is visible or not. (SPR00093367)

Dictionaries for Combo Boxes

When opening batches in Validation, the combo box no longer shows incorrect dictionary content. (SPR00075482)

Disabling Force Valid Option

If the "Allow force valid" option of the validation form is set to "false," the Force All Fields Valid button in the toolbar is no longer available. (SPR00103746)

Displaying Tab Details For Validation Form has Long Transition Time

Transition time for forms with many tabs has been decreased. (SPR00074693)

Double-Clicked Word Added to New Field

A previously double-clicked word was added to a new field if the mouse pointer was not moved between documents. Now, content is properly reset when a new document is loaded. (SPR00103112)

Embedded Columns Not Working

The embedded columns feature can now be used in manual and automatic mode. (SPR00094750)

Error Accessing a Local Fuzzy Database

If an update or import is already in progress, any pending searches will wait until the update or import is complete. (SPR00120107, SPR00112586)

Error Typing After Confirming Previous Field

An error no longer occurs when you confirm a field in a table cell, and then type in a restricted content combo box. (SPR00096841)

Filter Option for Date Column in Open Batch Dialog Not Working

You can now filter batches by date. (SPR00076006)

Fixed Validation Events

The following validation events are now executed correctly:

- `AfterFieldChanged` is now fired for table cells each time you enter text manually or select text from the document. (SPR00121006)
- `AfterTableCellChanged` is now thrown if you point and click. This includes when a cell is valid and you click a word in the document. (SPR00121774, SPR00121775)

FoX-Exception Index Out of Range Errors

The FoX exception in Validation is a consecutive error, caused by the project design using project fields and locators for classification and Document Review for Batch Restructuring. Server 2 reused the no longer valid alternatives from the first server step for extraction, which lead to the index out of range error due to no more existing pages. Page corrections are now also done for alternatives and sub fields.

Opening and closing Validation without processing a batch in Windows 7 also no longer leads to an error and the module no longer terminates abnormally. (SPR00075323, SPR00108031)

Fuzzy Database Lookup Ignores Maximum Results Parameter, Returns All Entries

The fuzzy database lookup returns the records with the best confidences in the Search window. To improve the response time and to reduce the memory usage the number of returned results can be limited using the Maximum Results option. However, the number of results may be exceeded as all results are returned until the Maximum Results value is reached plus all results that have the same confidence value as the last search result within that range.

To solve performance issues you can configure the new option for the database lookup properties, Display Results by Step and Maximum Results Displayed. Set the Display Results by Step option to True and define the value for Maximum Results Displayed. Now the search results are displayed in steps. Additional buttons - Next, Previous, and All - are displayed to navigate the search results. (SPR00120293)

Error When Minimizing Remote Desktop Session During Module Loading

There is no longer an exception when Validation is minimized or loaded on a remote session. (SPR00050520)

Image Copied in Validation is Distorted when Exported as PDF

Images, created in Kofax Capture, are now correctly initialized in Kofax Transformation Modules - Validation, so that the PDF Generator keeps the color information of the newly created documents and pages. (SPR00075248)

Image Files are Deleted when Rotated in Validation and Document Review

When rotating images in Validation and Document Review, the files of the rotated images are no longer deleted from the working image folder of the batch, and no error is displayed. (SPR00107134)

InPlace Editor Causes Errors when Table Cell is Changed

If AfterTableCellConfirmed contains code that changes the text of another field, it worked when confirming the cell itself. When the InPlace editor is used, the script executed without error, but it generated an error after execution. The InPlace editor was fixed so that changes are processed correctly. (SPR00107108)

Invoice Validation Method Not Handling Negative Values

If an invoice had negative values, an invoice was considered valid if the absolute value of equaled the total. The total is now evaluated correctly, and 0 can be used. (SPR00094709)

Memory Leak During Validation

Memory consumption problems when closing a batch or forcing a field valid are now resolved. (SPR00121580)

Missing Confident Results If Number Exceeds Maximum Results

If the number of relevant records returned by database lookup exceeds the Maximum Results configured for the lookup, the most appropriate entries are now returned. (SPR00113372)

Negative Field Height Caused Errors

If the field height has a negative value, the validation form now displays the Miniviewer correctly. (SPR00092263)

Performance Issues with Masking Documents

Drawing masked areas on a document has been improved. (SPR00120505)

Processing Child and Parent Classes in Scripts

Application_InitializeBatch was not fired before Batch_Close in parent mode. An InitializeBatch call was added before a batch was closed, suspended, or rejected in case the parent was closed. (SPR00093890)

Read-Only Fields Editable from InPlace Editor

Read-only fields can now be modified in the InPlace Editor. (SPR00116312)

Read-Only Fields Set to be Editable Still Generate Warnings

You can now configure fields that were read-only in the first step of Validation to be editable in the subsequent step. (SPR00116311)

Reclassifying Document Caused Error

Reclassifying a document by selecting an item in a combo box no longer causes an error. (SPR00119304)

Search Value Does Not Appear in Database Lookup

If a search with the `DatabaseDialog.DBLookupFuzzy` object returns several results, the window that is displayed now shows the search text and enables you to select the result with the mouse and keyboard. (SPR00092981)

Selecting and Deleting Multiple Documents and Pages Deletes Next Document

The selection of entire documents and individual pages no longer causes problems. (SPR00119447)

Shortcut Results in Wrong Text in InPlace Editor

When pressing the keyboard shortcut for a database lookup, the wrong field information is no longer displayed in the InPlace Editor and the field is populated. (SPR00119497)

Source and Page Index in Wrong Order

The `SrcPageIndex` and `NewPageIndex` parameters are now in the correct order when the `BeforeCreateDocumentMovingPage` event is executed. (SPR00114565)

System Memory Exception

The memory usage of modules is successfully released when the module is closed. (SPR00113816)

Time Lag When Typing in Validation Field Box

The time lag no longer occurs. (SPR00093131)

Use as Display Field Option Fails

The document name in the Batch Content panel is now updated when it is being used as a display field. (SPR00120692)

Validation Viewer Disappeared in Multi-User Environments

The Viewer is correctly displayed in the Validation module, even when there are multiple users. (SPR00088161)

Validation Viewer Resized when Floated

The Validation Viewer window retains its size when it is floated and docked. (SPR00090312)

Validation Fields Not Hiding Field Labels

When the visible property for `ValidationForm.FieldLabels` is set to false, field labels are now correctly hidden on the validation form. (SPR00094871)

Value of Field Name Parameter Changed

`ValidationForm_InitializeComboBox` now correctly contains the `FieldName` value. (SPR00121021)

Zoom Setting Not Retained after Leaving Edit Mode

When you set the zoom level in Validation and exit edit mode, the zoom level was now retained. (SPR00056942)

Verification

The following problems were resolved for Verification.

Verification Runs out of Memory

Verification no longer runs out of memory when displaying large documents with color images. Pages are now unloaded automatically to save memory while still enabling browsing. (SPR00092218)

Verification Zone Highlighting Shifts

The missing page switch has been added and highlighting of fields work correctly. (SPR00114390)

Known Issues

This section contains information about potential problems that you could encounter while using Kofax Transformation Modules. These problems are organized by product feature, and workarounds are provided as applicable.

A2iApg.exe Crashes

When corrupted or unsupported TIF files are processed, A2iApg.exe crashes and the document cannot be processed. (SPR00120047)

Workaround: Remove the document from the batch.

Custom Storage Strings Not Available After Batch Restructuring Operations

When applying Edit Batch or batch restructuring operations, such as copy or merge documents, existing custom storage strings are not handled correctly. You can use events, such as `BeforeMergeDocument` or `AfterCopyPage` to restore the values correctly. (SPR00097249)

Workaround: Several script samples are provided together with this SPR that allow to restore the values.

Ignoring a Document for Classification and Separation

If a document in the Classification Set is marked "Ignore for Classification and Separation", there is no indication that the document, Classification Set, or the project has unsaved changes. If you close the project without saving these changes, they are lost and you are not notified. (SPR00124766)

Locale Name is returned as "de-DE" instead of "de"

When German is selected, the `Kofax.SDK.CaptureInfo.CaptureInfo.LocaleName` function returns "de-DE". This behavior differs from the documented behavior. (SPR00094565)

Names of Project Elements Not Handled Correctly

If you type a very long name for a project element such as a class name or a document subset, the name runs off the screen, it is not truncated, and there are no tooltips to show the full name. (SPR00110654)

Workaround: Use shorter names or expand the windows so that the entire name is visible.

Script Tooltips No Longer Available

When using the Script window debug mode, tooltips are no longer displayed when hovering over variables. (SPR00119969)

Training Sets Not Generated Correctly

If a directory within the New Samples folder is moved on the file system, an error is displayed when the project is opened because the configured locators cannot find the expected samples. (SPR00119701)

Uninstalling Leaves Common Files Behind

After uninstalling Kofax Transformation Modules, several common files are left behind. This is known to happen on Windows Server 2008, but it may occur on other operating systems as well.

Workaround: Manually delete %Program Files%\Common Files\Kofax\A2iA343 and its subfolders.

Thin Client Server Not Supported on Windows Server 2012

Windows Server 2012 cannot run the Thin Client Server. (SPR00124698)

Workaround: Install the Thin Client Server on a Server that runs a Windows Server 2003 or 2008 operating system.