

Kofax Transformation Toolkit

6.0.2

Release Notes



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About This Release

This set of release notes contains important information not included in other Kofax Transformation Toolkit 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.

Version Information

The Kofax Transformation Toolkit 6.0.2 release has the following build number, which appears in the About Kofax window:

6.0.2.0.0.1784

New Features

The following new features are available in Kofax Transformation Toolkit 6.0.2.

A2iA Support for Additional Check Reader Fields

The A2iA Check Reader provides several predefined fields. However, there are many other Check Reader fields available. You can now add additional Check Reader fields that are defined in the A2iA Configuration Editor for use in the A2iA Zone Locator. In the A2iA Zone Locator Properties window, these are called custom subfields.

Each custom subfield is mapped to one or more output paths. For each output path, you provide the nodes from the Tree Bar in the A2iA Configuration Editor that contain the extraction results, location, and confidence values. You select these nodes from a window that displays the tree view of the document.

You can also customize the regular expressions used to extract and format data retrieved by the output path. If a custom subfield has more than one output path, they are concatenated together into a single string and each path is separated by a delimiter that you specify.

JPEG and PNG Support

JPEG and PNG (*.jpg, *.png) images can now be used in Project Builder for testing and in production if your Server module supports these [image types](#).

New Buttons when Managing Training Conflicts

A set of additional buttons are now available when editing training conflicts so that the project administrator can delete one or more conflicting fields or documents as required.

Windows Server 2012 Support for Thin Client Server

Thin Client Server can now be used on Windows Server 2012. IIS needs to be configured so that `HTTP Activation` is enabled.

Changes in Behavior

The following change has been made to the behavior of Kofax Transformation Toolkit 6.0.2.

Renamed Subfields Tab in the A2iA Zone Locator Properties Window

The Subfields tab in the A2iA Zone Locator Properties window was renamed to Zonal Subfields. The fields and functionality of the tab have not changed.

When you open a project created in a previous version of Kofax Transformation Toolkit, subfields appear in the Zonal Subfields tab and the predefined fields appear in the [Custom Subfields tab](#). After you save the project in version 6.0.2, it cannot be used in an earlier version of Kofax Transformation Toolkit.

Resolved Issues

The following problems have been resolved in Kofax Transformation Toolkit 6.0 Service Pack 2.

Advanced Zone Locator Error

An invalid argument [522] error may occur with the Advanced Zone Locator when using images of different resolutions. The exception was thrown when the anchors reached the edges of an image. This problem has been resolved and an error no longer occurs. (322105)

Advanced Zone Locator with Image Cleanup Slows Processing

The way in which temporary files are named has been improved in order to prevent file name collisions. (335141)

Batches Remain In Progress in Server

If an `ExtractionProcess` fails, the batch is now redirected as expected. (292932)

Conflict Management - Delete Conflicting Fields and Documents

It is now possible to delete both fields and documents that cause extraction conflicts. A set of additional buttons are now available so that the project administrator can delete one or both conflicting fields or documents as required. (SPR00123474)

Class Names with Non-ASCII Character Problems

Class names that include special Non-ASCII characters are now fully supported by Project Builder. (292985)

Database Locator Confidence Greater Than 100%

When a Fuzzy Database is configured to use "Basic" Database processing for Optimization, the confidence for the Database Locator that uses that database is now correctly calculated. (377830)

Deleting Locator Alternatives in Project Builder

Locator alternatives are no longer deleted when testing your extraction settings using one or more documents in a Test Set. (327198)

Document Review Classification Combo Box Problems

All single-keyed characters are now recognized when typed into the Classification combo box. (314433, 346096)

Document Review - Selecting Multiple Problems and Confirming Last Problem Crashes Module

Document Review no longer crashes when selecting multiple documents and confirm the last problem in a batch. (SPR00148099)

FineReader Vertical Line Recognition Improvements

A new setting to specify the [text direction](#) of CJK languages is now available for the FineReader Page and Zone Recognition Profiles.

This new option is located in the new 'CJK Settings' group and is called 'Text Direction'. You can choose between Autodetect, Horizontal and Vertical. (322563)

Fuzzy Database Error

A connection settings problem when setting up the client proxy is now handled properly. (347483, 347513)

Kofax Search and Matching Server Connections

You can increase the number of parallel connection running on Kofax Search and Matching Server by modifying the WCF connection settings in the Registry. See the *Kofax Search and Matching Server 6.0.2 Release Notes* for instructions. (343965, 353340)

Line Item Matching Locator Improvements

A new [option](#) has been added to the Line Item Matching Locator Properties - Settings Tab. The new option is called 'Enable purchase order discovery' and is enabled by default for new projects.

When enabled, additional purchase order numbers are returned if they match the VendorID that was found on the purchase order. When disabled, only purchase order numbers found by the Input locator are used.

The 'Maximum number of purchase orders for discovery' option has been renamed to 'Maximum purchase orders used' and restricts the total number of purchase orders allowed, regardless of whether or not 'Enable purchase order discovery' is selected or not. Setting the maximum option to 0 means that unlimited purchase orders can be used. (327210)

Locator Region Problems for PDFs

Locator regions are now displayed correctly on PDF documents. (314000)

Masked Area Disables Lasso Function

It is now possible to lasso content on every page in Validation, even when there is a masked area on the first page. (324837)

Merging Projects Error

It is now possible to successfully merge two projects with classification and extraction training data. (285647, 372460, 350889)

Mobile License Support for Kofax

Kofax Transformation Toolkit now fully supports Kofax Mobile Drivers License 1.1. (344033)

PDF Samples Fail When Added for an Advanced Zone Locator

PDF samples from any drive can now be added to an Advanced Zone Locator. Adding a sample from a drive other than C: / no longer generates an “Invalid file path” error. (370766)

Results Differ Between Project Builder and Runtime

When testing trainable locators in Project Builder, the test results now reflect the results you would expect during production. (343029)

Shortcut Key Assignments in Validation

It is now possible to add the following keyboard shortcuts in Validation:

- F5
- Shift+ F5
- Ctrl + F5
- Ctrl + Shift + F5

(310742)

Specific TIFF Files Cause an Error

Specific TIFF files cause “The following document is corrupt and cannot be opened” error. This has been resolved by improving the handling of TIFF files. (353120)

String Extracted Twice Using Japanese Abbyy FineReader

An update was made to the Abbyy FineReader recognition engine. Strings are no longer extracted twice when using Abbyy FineReader with the Japanese language pack. (322567)

Thin Client Correction Hangs

Batches no longer cause unhandled exceptions when opened in Thin Client Correction. (316042)

Thin Client Validation Logon Problems

On rare occasions, an error prevented users from logging on to Thin Client Verification because of an active session. This error no longer occurs and it is now possible to log on to Thin Client Validation without active session errors. (314323)

Trainable Locator Incorrect Window Title

Trainable Locator properties windows have been fixed so they now look up the file name from the correct list. (342966)

Validation - Adding Rows via Script Crashes Application

It is now possible to add more than 300 rows to a table via script in Validation without the application freezing. (374499)

Validation Form Tab and Panel Size

Panel resizing now works correctly on the validation form. This includes tab labels when foldering is enabled and panels. (316160)

Validation Form Down Arrow Irregularities

Pressing the Down Arrow key while in the last validation field of a tab will now switch to the first validation field on the next tab. Pressing the Up Arrow key while in the first validation field of a tab will now switch to the last validation field on the previous tab.

Additionally, if you are in the first validation field on the first tab, pressing the Up Arrow key will take you to the last validation field on the last tab of the previous document. Similarly, if you are in the last validation field on the last tab of a document, pressing the Down Arrow key will take you to the first validation field on the first tab of the next document. (327961)

Value Range Error in Project Builder

Project Builder no longer displays an error message when classification or extraction is performed on specific images. This behavior is observed only on the Windows Server 2008 R2 Japanese operating system. (319688)

XValues Set by Script Not Saved

XValues set by script while processing documents in the Project Builder are now saved to the .xdc file. XValues are saved when executing Save Selected Documents or Save Document Set commands or when a process in Project Builder is interrupted. (346064, 363809)

Known Issues

The following sections describe known problems, and if available, useful workarounds for Kofax Transformation Toolkit 6.0.2.

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)

Images with Photometric Interpretation Incorrectly Displayed in the A2iA Configuration Editor

In the A2iA Configuration Editor, images set for photometric interpretation are not displayed correctly. These images are correctly displayed and have the correct locator results in Kofax Transformation Toolkit. (370807)

Workaround: In the A2iA Configuration Editor, select the imagePreprocessing node in the Tree Bar and set the reverseValues field to **AutoDetect**. This setting enables the A2iA Configuration Editor to reverse images as needed.

Installing or Removing Thin Client Server Reverts Web.Config

If you remove the Thin Client Server after a Service Pack was installed, the `web.config` file is reverted back to its state when the Thin Client Server from Kofax Transformation Toolkit 6.0 was first installed. Any modifications are lost.

Similarly, if you install the Thin Client Server from Kofax Transformation Toolkit 6.0.2, the `web.config` file is overwritten with a default copy and any changes are lost. (375819)

Workaround: Before installing or removing the Thin Client Server from Kofax Transformation Toolkit 6.0.2, make a copy of your `web.config` file so that you can manually restore any modified settings.

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.

Oracle Databases Refresh Problem

It can take 2-3 attempts to successfully refresh an Oracle database using the Refresh button on the Databases Tab in the Project Settings. (SPR00107826/2720283)

Removing Kofax Transformation Toolkit via the MSP Installer

If you use the “Remove” button from the installation window to uninstall this or the previous Service Pack, an error is encountered and the removal fails. (378588)

Workaround: Remove the Service Pack using either the Add or Remove Programs utility or the Programs and Features utility depending on your operating system.

Script Tooltips No Longer Available

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

Thin Client Server does not Support Internet Explorer 11

Although Windows Server 2012 is now supported by the Thin Client Server and Internet Explorer 11 is delivered with that operating system, Thin Client Server does not support Internet Explorer 11. Any communication between on of the Thin Clients and the Thin Client Server must use a supported Web Browser and not Internet Explorer 11. (374031)

Workaround: Use Mozilla Firefox or Internet Explorer 10.

Additional Documentation

The following sections provide additional documentation for new features available in Kofax Transformation Toolkit 6.0.2, that is not available in existing documentation.

Help Updates for Project Builder

The following changes will be made to the *Project Builder help* in the next Kofax Transformation Toolkit full release.

New: FineReader Zone and Page Recognition Profile Option

A new group is available for the FineReader Page Recognition Profile and the FineReader Zone Recognition Profile Properties windows. Due to an upgrade to a newer version of FineReader, this option is not needed in the next Kofax Transformation Toolkit release.

The new group and option for this release are as follows:

CJK Settings

This group has the following options:

Text Direction

For CJK languages, recognition rates can be improved if you know the direction of the symbols. Select one of the following text directions:

- Autodetect. This is the default value for this option.
- Horizontal.
- Vertical.

Updated: Settings Tab - Line Item Matching Locator Properties Window

The options on this tab have been reorganized and a new group called "Purchase Orders" will be available in the next Kofax Transformation Toolkit release as follows:

Purchase Orders

This group has the following options:

Purchase order number locator

Select a locator from the list that finds the purchase order number on a document. This option is mandatory in order to use this locator method.

The algorithm searches line items in the database that match the input locator alternatives. This list shows only those locators that are defined above the current Line Item Matching Locator in the list of locators for this class. The value for this option is set to <none> by default.

Minimum confidence

Set a minimum input confidence to restrict what the Purchase order number locator finds. The value for this option is set to 70 by default.

Formatter

Select a formatter from the list to format the results of the locator used for the purchase order number. This is especially useful if you need to delete additional blanks from the recognition results in order to have a format comparable to the one used in the database. The value for this option is set to <none> by default.

Vendor ID locator

Select a locator from the list that returns the vendor ID that restricts the possible results of the database search and compensates for errors in the purchase order number extraction. The Input Locator list provides a list of the locators that are defined above the current Line Item Matching Locator. The value for this option is set to <none> by default.

Minimum confidence

Set a minimum confidence to restrict what the Vendor ID locator finds. The value for this option is set to 70 by default.

Note If your project from an earlier version of Kofax Transformation Toolkit already makes use of the Vendor ID locator, the value for this option is set to 0 instead of 70 percent. This means that all Vendor IDs that are returned by the Vendor ID Locator are considered valid.

Execute purchase order discovery

Select this option to include additional purchase order records from the database that belong to the same Vendor. Clear this option if you want to disable purchase order discovery and use the purchase order number values from the Purchase order number locator or the Vendor ID locator only. This option is selected by default.

Maximum purchase orders used

Set a maximum number of purchase order numbers used for extraction. This option limits the total number of purchase order numbers found by the input locator and any discovered purchase order numbers. The value for this option is set to 20 by default.

New: Custom Subfields Tab - A2iA Zone Locator Properties Window

When an A2iA Zone Locator is added to a project and CheckReader as used as the A2iA Reader, several predefined custom subfields are included. If you need to extract data that is not available through a predefined custom subfield, you can create your own custom subfield. Each custom subfield has one or more output paths that provide a map to the data you need.

To define an output path, you select the nodes containing the extraction results, location, and confidence values. The values for output paths, location, and confidence correspond with the paths specified in the A2iA Configuration Editor. You can also modify the prefix and regular expressions used to format data that was extracted from the output path.

A custom subfield can contain more than one output path so that you can combine extracted data. The output paths are concatenated in the order you list them, and each path is separated by the delimiter you specify. For example, suppose there are different output paths for the three components that make up a date: the day, the month, and the year. When the date

custom subfield returns a value, the three different output paths are concatenated together and separated by the specified delimiter. The end result is a single string made up of three different output paths.

Use the fields in the Custom Subfields tab as follows.

Subfields

Use this group to create and manage custom subfields. This group contains the following fields and buttons.

Name

This field contains predefined custom subfields, and you can add custom subfields to the list. You can select a subfield to rename or delete it, and to assign output paths, locations, and confidence values in the Properties group.

Add

Click to add a subfield. It is given a default name, "SF_" with a number appended to provide a unique identifier. The best practice is to rename the subfield using this naming convention, "SF_<Descriptive Name>."

Delete

Click to remove the currently selected subfield.

Rename

Click to change the name of the selected subfield.

Properties

Use this group to add and configure output paths for the selected subfield.

Properties Table

Use this table to configure the output paths and their associated settings.

A2iA Output Path

The output paths defined for the selected subfield appear in this table. To change an output path, double-click it. The A2iA Output Path window appears, which displays a tree view of the node. Select or enter the output path.

Prefix

Enter any characters to append to the beginning of the output string before it is processed by the regular expressions. For example, you can use this column to add leading zeroes to a number.

To change the prefix used for the selected output path, click the field.

Regex Match

This field, along with Regex Replace, enables the data retrieved from an output path to be modified. For example, if the data retrieved from an account subfield is 123456789, and you want to format it as 123-456-789, use the following regular expressions:

- Regex Match: (\w{3})(\w{3})(\w{3})
- Regex Replace: \$1-\$2-\$3

If a subfield already has a regular expression in the Regex Match field, click the field to edit it. If this field does not have a value, click the field and enter the regular expression.

Regex Replace

This field takes the data matched with Regex Match and formats it by using a replacement string.

If a subfield already has a replacement string in the Regex Replace field, click the field to edit it. If this field is empty, click the field and enter the replacement string.

Use the following to manage and edit the output paths in the Properties Table:

Add

Click to add an output path.

The A2iA Output Path for Custom Subfield window appears where you select or enter the output path.

Delete

Click to remove the currently selected output path, along with its associated values.

Move Up

Move the selected output path up the list. Output paths are concatenated in the order they are listed.

Move Down

Move the selected output path down the list. Output paths are concatenated in the order they are listed.

Delimiter

Enter the characters used as a delimiter when more than one output path is specified.

The following fields set properties for the overall output path.

Location

Click Browse to open the Location for Custom Subfield window where you select or enter the location of the subfield data. A location node must contain the following child nodes: `x_tl`, `x_br`, `y_tl`, `y_br`, and `pageIndex`. If the node is invalid, an icon appears. Mouse over the icon for more information.

Confidence

Click Browse to open the Confidence for Custom Subfield window where you select or enter the path for the confidence value of the subfield data. If the node is invalid or does not contain the expected value, an icon appears. Mouse over the icon for more information.

A2iA Output Path, Location, and Confidence for Custom Subfield Windows

A window appears when you add or modify an A2iA Output Path or click Browse to select the Locator and Confidence values. The window has the following fields.

Tree View

The large field in the window displays a tree view with the hierarchy of results that may be recognized by the A2iA Zone Locator. Nodes that have branches attached are indicated by a plus (+) or minus (-) button. Click the button to expand or collapse the listing. Select the name of the node you want to use.

A2iA Output Path, Locator, or Confidence field

This field displays the complete path of the node you selected from the tree. You can edit the field as needed. If the node is invalid or does not contain the expected value, an icon appears. Mouse over the icon for more information.

Note If you select a node in the Tree View, any changes you made in the field are replaced by the selected node.

Creating Custom Subfields for an A2iA Zone Locator

Follow these steps to set up custom subfields.

- 1 **Open** the locator properties.
- 2 On the General tab, add reference documents.
- 3 On the Zones tab, select **CheckReader** as the A2iA Reader.
The Custom Subfields tab becomes enabled.
- 4 Click the **Custom Subfields** tab.
- 5 Create a new custom subfield. In the Subfields group, click **Add**. In place of the default name that appears, type a new descriptive name.
The best practice is to use this naming convention, "SF_<Descriptive Name>."
- 6 With the new custom subfield selected, add an output path.
 - a In the Properties section, click **Add**.
The A2iA Output Path for Custom Subfield window appears where you select or enter the output path.
 - b In the A2iA Output Path for Custom Subfield window, select the node in the tree containing the desired output path.
The complete path appears in the A2iA Output Path field. You can also type or edit the path in the field.
If you select a node for an array, a placeholder ([?]) appears for the array index number. Replace the question mark inside the brackets with the correct array index, such as [1].
If the path you selected is invalid, an icon appears in the window. Mouse over the icon to view a description of the error.
 - c If the path you selected is correct, click **OK**.
The A2iA Output Path for Custom Subfield window closes, and the selected path appears in the field in the A2iA Output Path column.
 - d Optionally, change the Prefix field to enter characters to append to the beginning of the output string before it is processed by the regular expressions. Click the field and enter the desired characters.
 - e Optionally, change the RegEx Match and RegEx Replace fields as needed.
These fields enable the data retrieved from an output path to be modified. For example, if the data retrieved from an account subfield is 123456789, and you want to format it as 123-456-789, use the following regular expressions:
 - RegEx Match: (\w{3})(\w{3})(\w{3})
 - RegEx Replace: \$1-\$2-\$3

Click a field and enter the desired characters.

Note If you need to delete an output path, select the row in the Properties table and click the **Delete** button in the Properties section. Do not click the Delete button in the Subfields section because it deletes a custom subfield.

- 7 If the custom subfield uses multiple output paths, do the following:
 - a Add output paths by repeating the previous step.
 - b Set the output paths in the order they should be concatenated. Select an output path and click **Move Up** or **Move Down** to change the order.
 - c In the **Delimiter** field, enter the characters used as a delimiter between the output paths.
- 8 In the Location field, select or enter the location of the subfield data.
 - a Click **Browse** to the right of the field.
The Location for Custom Subfield window appears.
 - b In the Location for Custom Subfield window, select the node in the tree containing the location of the subfield data. A location node must contain the following child nodes: `x_tl`, `x_br`, `y_tl`, `y_br`, and `pageIndex`.
The complete path appears in the Location field. You can also type or edit the path in the field.
If you select a node for an array, a placeholder ([?]) appears for the array index number. Replace the question mark inside the brackets with the correct array index, such as [1].
If the path you selected is invalid, an icon appears in the window. Mouse over the icon to view a description of the error.
 - c If the path you selected is correct, click **OK**.
The Location for Custom Subfield window closes, and the selected path appears in the Location field.
- 9 In the Confidence field, select or enter the path for the confidence value of the subfield data.
 - a Click **Browse** to the right of the field.
The Confidence for Custom Subfield window appears.
 - b In the Confidence for Custom Subfield window, select the node in the tree containing the location of the subfield data.
The complete path appears in the Confidence field. You can also type or edit the path in the field.
If you select a node for an array, a placeholder ([?]) appears for the array index number. Replace the question mark inside the brackets with the correct array index, such as [1].
If the node is invalid or does not contain the expected value, an icon appears. Mouse over the icon for more information.
 - c If the path you selected is correct, click **OK**.
The Confidence for Custom Subfield window closes, and the selected path appears in the Confidence field.
- 10 Click **Close** to close the locator properties window.

- 11 Save the changes to your project.

Modifying a Custom Subfield for an A2iA Zone Locator

If a custom subfield is not performing as expected, or if you want to change a predefined subfield, follow these steps:

- 1 **Open** the locator properties.
- 2 Click the **Custom Subfields** tab.
- 3 In the Subfields section, in the Name list, select the custom subfield to be modified.
- 4 To rename the custom subfield, click **Rename** and type a new name.
- 5 To change the output path for the selected custom subfield, do the following.
 - a In the A2iA Output Path column, double-click the output path to change. The A2iA Output Path for Custom Subfield window appears where you select or enter the output path.
 - b In the A2iA Output Path for Custom Subfield window, select the node in the tree containing the desired output path. The complete path appears in the A2iA Output Path field. You can also type or edit the path in the field. If you select a node for an array, a placeholder ([?]) appears for the array index number. Replace the question mark inside the brackets with the correct array index, such as [1]. If the path you selected is invalid, an icon appears in the window. Mouse over the icon to view a description of the error.
 - c If the path you selected is correct, click **OK**. The A2iA Output Path for Custom Subfield window closes, and the selected path appears in the field in the A2iA Output Path column.
 - d Optionally, change the Prefix field to enter characters to append to the beginning of the output string before it is processed by the regular expressions. Click the field and enter the desired characters.
 - e Optionally, change the RegEx Match and RegEx Replace fields as needed. Click the field and enter the desired characters.

Note If you need to delete an output path, select the row in the Properties table and click the **Delete** button in the Properties section. Do not click the Delete button in the Subfields section because it deletes a custom subfield.

- 6 If the custom subfield uses multiple output paths, do the following:
 - a Add output paths by repeating the previous step.
 - b Set the output paths in the order they should be concatenated. Select an output path and click **Move Up** or **Move Down** to change the order.
 - c In the **Delimiter** field, enter the characters used as a delimiter between the output paths.
- 7 In the Location field, select or enter the location of the subfield data.
 - a Click **Browse** to the right of the field. The Location for Custom Subfield window appears.

- b** In the Location for Custom Subfield window, select the node in the tree containing the location of the subfield data. A location node must contain the following child nodes: `x_tl`, `x_br`, `y_tl`, `y_br`, and `pageIndex`.
The complete path appears in the Location field. You can also type or edit the path in the field.
If you select a node for an array, a placeholder ([?]) appears for the array index number. Replace the question mark inside the brackets with the correct array index, such as [1].
If the path you selected is invalid, an icon appears in the window. Mouse over the icon to view a description of the error.
 - c** If the path you selected is correct, click **OK**.
The Location for Custom Subfield window closes, and the selected path appears in the Location field.
- 8** In the Confidence field, select or enter the path for the confidence value of the subfield data.
- a** Click **Browse** to the right of the field.
The Confidence for Custom Subfield window appears.
 - b** In the Confidence for Custom Subfield window, select the node in the tree containing the location of the subfield data.
The complete path appears in the Confidence field. You can also type or edit the path in the field.
If you select a node for an array, a placeholder ([?]) appears for the array index number. Replace the question mark inside the brackets with the correct array index, such as [1].
If the node is invalid or does not contain the expected value, an icon appears. Mouse over the icon for more information.
 - c** If the path you selected is correct, click **OK**.
The Confidence for Custom Subfield window closes, and the selected path appears in the Confidence field.
- 9** Click **Close** to close the locator properties window.
- 10** Save the changes to your project.

Deleting Custom Subfields for an A2iA Zone Locator

If a custom subfield is no longer required, the best practice is to remove it from your project. This ensures that your reference document is not cluttered with unnecessary custom subfields, and other users do not mistake it as valid. Delete a custom subfield by following these steps.

- 1** **Open** the locator properties.
- 2** Click the **Custom Subfields** tab.
- 3** In the Subfields section, in the Name list, select the custom subfield to be deleted.
- 4** Click **Delete**.
- 5** Click **Close** to close the locator properties window.
- 6** Save the changes to your project.

Updated: Supported File Types

This topic has been modified to include new supported file types and will be updated in the next Kofax Transformation Toolkit full release as follows:

- TIFF (*.tif)
- JPEG (*.jpg)
- PNG (*.png)

Updated: Image Files

This topic has been modified to remove TIFF specific information and to include new supported file types. This topic will be updated in the next Kofax Transformation Toolkit full release as follows:

The minimum supported resolution for scanned images is 96 DPI. However, the recommended resolution is between 200 and 300 DPI.

For images, the resolution for scanning and importing should be the same as the resolution for the sample images that were used to train layout classification, trainable group and table locators, or to set up zonal recognition in Project Builder. Faxes are usually scanned by the sender at 200 DPI resolution, whereas for invoices, forms and mailroom documents, 300 DPI resolution provides the best image quality.

The following image file formats are supported in Project Builder

- TIFF (*.tif)
- JPEG (*.jpg)
- PNG (*.png)

Important In order to support JPEG and PNG images, your scan module needs to support these formats.

New: TIFF Image Support

A new topic discussing TIFF image support will be added to the *Project Builder help* in the next Kofax Transformation Toolkit release as follows:

TIFF Image Files

To process scanned (or later imported) documents with Kofax Transformation Toolkit, the best practice is to use sample images in the same compression format as the scanning application provides.

Multi-page TIFF files need to be split into multiple single-page files before they are processed with Kofax Transformation Toolkit.

When a document is scanned, each page is saved as a TIFF image file. Kofax Transformation ToolkitProject Builder supports the following TIFF (.tif) compression formats:

Bi-tonal (black and white)

- Uncompressed
- Fax TIFF - G3 (CCITT Group 3)
- Fax TIFF - G4 (CCITT Group 4)

- RLE (Run Length Encoded)
- Packbits

The standard compression format for fax and bi-tonal images is TIFF - G4.

256-level grayscale and 24-bit RGB

- Uncompressed
- TIFF - JPEG compression

New: JPEG Image Support

A new topic discussing JPEG image support will be added to the *Project Builder help* in the next Kofax Transformation Toolkit release as follows:

JPEG Image Files

When a document is photographed, each page can be saved as a JPEG image file. For example, you can use a smart phone to photograph a document, check, or invoice. These JPEG files can then be used in Project Builder for testing.

Project Builder supports the following JPEG (.jpg) formats only:

JPEG 8-bit, grayscale

Standard and progressive encoding.

JPEG 24-bit, RGB

Standard and progressive encoding.

The following JPEG formats are **not** supported:

- JPEG 32-bit, CMYK
- Old-JPEG / JPEG (old style)
- JPEG2000
- JPEG-LS (lossless)

To use JPEG images in Kofax Transformation Toolkit, your scan module should support JPEG files.

New: PNG Image Support

A new topic discussing PNG image support for testing will be added to the *Project Builder help* in the next Kofax Transformation Toolkit release as follows:

PNG Image Files

When a document is photographed, each page can be saved as a PNG image file. For example, you can use a smart phone to photograph a document, check, or invoice. These PNG files can then be used in Project Builder for testing.

Project Builder supports the following PNG (.png) formats only:

PNG 1-bit, bi-tonal

PNG 8-bit, grayscale

PNG 16-bit, grayscale

The alpha channel (transparency layer) is ignored when loaded into Project Builder.

PNG 24-bit, RGB**PNG 32-bit, RGB**

The alpha channel (transparency layer) is ignored when loaded into Project Builder.

PNG interlaced

ADAM7

PNG non-interlaced

To use PNG images in Kofax Transformation Toolkit, your scan module should support PNG files.

Updated: Black and White Images

This topic has been modified to include the new supported file types and will be updated in the next Kofax Transformation Toolkit full release as follows:

The TIFF image file format is used for bi-tonal, grayscale, and full color documents. JPEG images support grayscale and color documents and PNG images support bi-tonal, grayscale. All of these image types can be converted to black and white bi-tonal images.

Updated: New Project Window

The two image options on this window have been modified and will be available in the next Kofax Transformation Toolkit release as follows:

Include image files (*.tiff, *.jpg, *.png)

Select this option to include image files in your import for layout classification. This option is selected by default.

Include image files (*.tiff, *.jpg, *.png)

Select this option to include image files in your import for content classification. This option is cleared by default.

New: Anchors Used for Registering an Advanced Zone Locator

Anchors can be used for registration when you select Custom as the Registration Type and select the Anchors option for Global Registration on the Registration tab. The anchors used for registration are indicated by the check boxes in the Registration column. These check boxes are enabled only when anchors can be used for registration.

As you add anchors, they are selected for registration by default. If you do not want to use an anchor for registration, clear the check box in the Registration column. At least three anchors must be selected for registration to use anchors for global registration.

The registration is valid if at least three anchors selected for registration are found, and they meet the minimum registration confidence. If less than three of those registered anchors are found, or the confidence is less than the minimum, the registration is invalid and cannot be used. Instead, the next selected registration method is used.

Changed: Normalizing the Image Source File Structure

This topic has been modified and will be updated in the next Kofax Transformation Toolkit full release as follows:

XDocuments contain all of the necessary information about their corresponding source files.

To normalize the image source file structure means to reorganize the source files so that they reflect the structure of the XDocument as follows:

- A normalized single-page XDocument contains extraction data, and other relevant data for a TIFF file with exactly one page.
- A normalized multi-page XDocument contains extraction data, and other relevant data for a multi-page TIFF file with exactly the same number of pages as the XDocument, in the exact order as in the XDocument.

Consider the following notes about normalizing the source file structure:

- All image files are converted into TIFF images during normalization.
- Normalization only works for XDocuments that represent image files. XDocuments that represent TXT or PDF files cannot be normalized.
- Because an image file can be referenced by more than one XDocument, the original file is not changed. This is to avoid corrupting the other XDocuments. Instead, a new image file is created. If an XDocument already has a normalized structure then a new image file is not created.
- Before normalizing starts, you have to confirm that you want to delete obsolete image files. Obsolete image files are files that no longer are referenced by any XDocument.
- If you delete the obsolete image files, only XDocuments that are part of the currently selected document set are checked.

Important Any XDocument that represents one or more deleted image file produces an error when displayed.

- To keep XDocuments consistent, all changed XDocuments and the batch/root folder are automatically saved after normalizing. This also includes any changes that were applied to the document subset prior to normalization.

For the procedure, step 5 has been modified as follows:

- Click **OK** to confirm normalization. Alternatively, click **Cancel** to close the window without normalizing the source file structure.

After clicking Yes, a progress window is displayed. After all documents are normalized, a message box is displayed that lists the status of the document(s) and the number of deleted obsolete image files.

Installation Guide Updates

The following change will be made to the *Kofax Transformation Toolkit Installation Guide* in the next Kofax Transformation Toolkit full release.

Updated: Software Prerequisites

A new prerequisite will be added to the list in the next full release of Kofax Transformation Toolkit.

- Runtime libraries for Visual C++ VS2008

This is installed alongside the product during installation.

Help Updates for Validation

The following change will be made to the *Validation help* in the next Kofax Transformation Toolkit full release.

Updated: Settings Window - Miscellaneous Tab

This topic has been modified to include the new option and will be updated in the next Kofax Transformation Toolkit full release as follows:

Allow Ctrl + Arrow keys for shortcuts

Selecting this option enables users to scroll the image up, down, left, and right using the keyboard. This option is cleared by default.

Important Selecting this option disables standard windows text selection and navigation behaviour in text and combo box fields.

Thin Client Server Installation Guide Updates

The following change will be made to the *Kofax Transformation Toolkit Thin Client Server Installation Guide* in the next Kofax Transformation Toolkit full release.

New: Installing Thin Client Server for Windows Server 2012

The following section provides instructions for installing Thin Client Server on a Windows Server 2012 and IIS 8.0 or a Windows Server 2012 R2 and IIS 8.5.

- 1 On the workstation where Kofax Transformation Toolkit is installed, shut down any applications (including Control Panel, virus detection software, and toolbars) that are running.
- 2 Start the installation by running **KTS.msi** in the Thin Client Server folder of the product files. If you are running the installation from removable media, the installation should start automatically.
- 3 Click **Next** to install the software.
If IIS is not yet installed, a message is displayed. You can ignore this for now and install IIS at a later time.
- 4 Read the End-User License Agreement and, if you agree with the terms, select the **I accept the terms in the License Agreement** option, and click **Next**. Otherwise, click **Cancel** to exit.
- 5 If necessary, change the default installation location or folder name, and click **Next**.

- a** Click **Change**.
- b** Browse to, or type the new location, and click **OK**.
- 6** Click **Install**.
- 7** When the installation is complete, click **Finish**.
- 8** If not available already, install the Web Server (IIS) and ASP.NET using the Server Manager:
 - a** From the Quick start section, click **(2) Add roles and features**.
The Add Roles and Features Wizard is displayed.
 - b** In the left panel, select **Server Roles**.
If the Server Roles option is greyed out, first select Server Selection. This activates the Server Roles option.
The central panel is updated with a list of Roles.
 - c** From the list of Roles, select **Web Server (IIS)**.
A small Add Roles and Features Wizard window is displayed the Web Server features that that are installing.
 - d** In the small Add Roles and Features Wizard Window, click **Add Features**.
The window is closed and you are returned to the Server Roles section of the Add Roles and Features Wizard.
 - e** In the Select Server Roles window, click **Next**.
The central panel is updated with a list of Features.
 - f** From the list of Features, select **.NET Framework 4.5 Features**.
The available .NET Framework options are expanded.
 - g** Select **ASP .NET 4.5**.
 - h** Expand WCF Services and select **HTTP Activation**.
A small Add Roles and Features Wizard window is displayed and shows the selected .NET Framework options that you are installing.
 - i** In the small Add Roles and Features Wizard Window, click **Add Features**.
The window is closed and you are returned to the Features section of the Add Roles and Features Wizard.
 - j** Click **Next** when you have finished adding the .NET Framework features.
The central panel is updated with some information about the Web Server Role (IIS).
 - k** Click **Next** when you have read the IIS information.
The central panel is updated with a list of Role services that will be installed with IIS.
 - l** Click **Next** when you have finished reviewing the list of installed services.

Note The default list of services is sufficient for more installations. Only add an additional service if you have a specific requirement for that service.

The central panel is updated with a list of roles and features that you are installing.
 - m** Click **Install**.
A progress bar show the installation progress.
 - n** When the installation is complete, click **Close**.

IIS and ASP.NET are now installed and ready to use.

- 9 Configure the Kofax Transformation Toolkit - Thin Client Server Web site using the Internet Information Services (IIS) Manager:
 - a From the Connections panel, expand the **Sites** folder.
 - b Right-click the Default Web Site and select **Add Application** from the menu. This launches the Add Application window.
 - c Type an Alias for your application, such as "ThinClientServer."
 - d Select an Application pool. The DefaultAppPool is selected by default and click **OK**.
 - e Browse to the location where you installed Kofax Transformation Toolkit - Thin Client Server in step 5 to set the path for this Web site, and click **OK**.
- 10 From the left **Connections** panel, select your newly added site a second time. A list of features is displayed in the middle panel.
 - a From the IIS section, double-click the **Authentication** feature. A list of authentication types is displayed in the middle panel.
 - b Select the ASP.NET Impersonation option and ensure it is **Disabled**.
 - c Restart the World Wide Web Publishing Service.
- 11 Click the **Application Pools** option from the Connections panel. A list of application pools is displayed on the right.
 - a Right-click the application pool you selected when adding your application and select **Advanced Settings**.
The Advanced Settings window is displayed.
 - b In the General group, set **Enable 32-Bit Applications** to True.
 - c In the Process Model group, set the **Maximum Worker Processes** option to **1**. This is the default setting.
 - d Optionally, if you are using an encrypted file system, you also need to click the **Identity** option from the Process Model group and change it to a custom account. This custom account needs to have the same permissions as the NetworkService account. Click the button to the right of Identity value. The Application Pool Identity window is displayed.
Select the Custom account option, and click **Set**.
Type a User name, Password, and Confirm password, and click **OK**.
Click **OK** to close the Application Pool Identity window, and again to close the Advanced Settings window.
 - e Double-click the selected application pool.
The Edit Application Pool window is displayed.
 - f From the .NET CLR version list, select **.NET Framework v4.0.30319**.
 - g Click **OK** to close the Edit Application Pool window.
- 12 Grant the IIS user account full control for <install drive>:\ProgramData\ \Capture. By default, the IIS user is IUSR.
- 13 Ensure that the IIS user account is part of the IIS_IUSRS group if it is not already so.

- 14 Create a `KTSUsers` group. You can add Microsoft “default users” to that group as needed.
- 15 Open Services and ensure that the **World Wide Web Publishing Service** is set to start automatically.
- 16 Test that users can connect to the server by going to `http://localhost/<VirtualDirectory>/ValidationLogin.aspx`, `http://localhost/<VirtualDirectory>/VerificationLogin.aspx`, or `http://localhost/<VirtualDirectory>/CorrectionLogin.aspx`.

Developer's Guide Updates

The following changes will be made to the *Kofax Transformation Toolkit Developer's Guide* in the next Kofax Transformation Toolkit full release.

Updated: Batch Processing with Server Scheduler Service (Batch Processor) Sample

This topic has been modified to remove TIFF specific information because there are new supported file types. Two of the Batch Processor string values and their descriptions will be updated in the next Kofax Transformation Toolkit as follows:

ProcessImages

If set to TRUE all supported image files in the batch directory are processed.

ProcessPdfs

Set this value to TRUE when your batch directory contains PDF files that you want processed.

Updated: Batch Processor - Settings Window

This topic has been modified to remove TIFF specific information because there are new supported file types. The File Type group will be updated in the next Kofax Transformation Toolkit as follows:

Image

By default this option is selected so that all supported image files of the batch directory are processed.

PDF

Select this option when your batch directory contains PDF documents that you want to process.