

Kofax e-Transactions

2.5

Release Notes



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Contents

- Introduction 5
- New Features 5
 - Improved Sendbox Application 5
 - Support for Unicode Characters 5
 - Sendbox Status Confirmations 6
 - Improved Status Information in Receiver Inbox 6
 - Simplified Sender Configuration 6
- Changes in Behavior 6
 - Multiple-Document EDI Files Now Sent Separately 6
 - Change to the Receiver Service 6
 - Unsupported Fonts in PDF Documents Now Handled Correctly 6
 - Change to Resend Behavior 7
 - No Restrictions When Opening the Sendbox 7
 - Document Transports 7
 - Invalid Documents No Longer Sent Immediately 7
 - Changes to the Structure of EDI Definition Files 8
 - Body of Reply Email Rendered in Multiple Formats 8
- Resolved Problems 8
 - Moveable Fields Feature Now Works Correctly 8
 - Print Processor Now Registered Correctly 8
 - Now Possible to Uninstall From Non-Default Location 8
 - Daily Transactional Report Now Sent Correctly 9
 - Now Possible to Configure a Template in a Chinese Locale 9
 - Problems with Symbol-Formatted Excel Cells Now Resolved 9
 - Additional Characters Now Supported for X12 Text Files 9
 - “Number of Copies” Template Option No Longer Restricts Access to Documents 9
 - Document with No Document Number Now Displays in Sendbox 9
 - Approval Email No Longer Sent to Sender Before Sender is Approved 9
 - Unprocessed Item Notification Email Now Sent Correctly 10
 - Misleading Email No Longer Sent to Sender when Agreement is Received 10
 - English (US) Language Now Available After Template Wizard Ends 10
 - Now Possible to Add Virtual Printer First in Printing tab 10
 - Required Restart of the Kofax e-Transactions Service Now Documented 10
- Known Problems 10
 - Batch Export Occasionally Fails During Processing 10
 - Problems When Installing Version 2.5 on the Same Computer as Version 1.0 11
 - Problems When Using Different Sender and Receiver Versions 11
 - Processing a Combination of EDI and Printed Documents Yields Unpredictable Results 11
 - Problems When Starting the Receiver Application After Using Scheduled Intermission 11
 - Same Receiver Licensing Error Message Is Displayed In Several Situations 12
 - Problems When Uninstalling Receiver Without Stopping the Kofax e-Transactions Service 12
 - Kofax e-Transactions Service Does Not Start After Installation If Kofax Capture License Is Not Activated 12

| | |
|---|----|
| Some Characters Do Not Display Correctly in the Kofax e-Transactions Interface | 13 |
| Printer Wizard Can Configure Only One Printer | 14 |
| Problems When Viewing Coordinates for Closely Grouped Line Item Data | 14 |
| Unicode Encoded EDI Files Cannot Be Processed | 14 |
| Field Recognition for Microsoft Office Word Documents Gives Unpredictable Results | 14 |
| New Agreement Required for Additional Receiver ID | 15 |
| New Agreement Required After Upgrade | 15 |
| No Context Menu Available in Template Designer | 15 |
| Additional Resources | 15 |
| Related Documentation | 15 |
| Training | 16 |
| Technical Assistance for Your Kofax Product | 16 |

Introduction

These release notes provide information about the following:

- New features in this release
- Changes in behavior in this release
- Resolved problems in this release
- Known problems in this release
- Additional resources, including related documentation, training, and technical support information

New Features

Kofax e-Transactions 2.5 includes the following new features.

Improved Sendbox Application

The Kofax e-Transactions Sender Sendbox application has been redesigned with a cleaner look and feel and improvements to all its existing functionality. In addition, the following features have been added:

- **Improved Client/Server Distribution**

The Sendbox application can be installed in a client/server environment so that you can set up dedicated Sendbox workstations throughout your organization. Each client computer accesses a central Sendbox service that you can install on your print server.

- **Fast Client Deployment**

You can install the client version of Kofax e-Transactions Sender within seconds, and set up queues to shared Kofax e-Transactions virtual printers with a single click from the Sendbox interface.

- **Improved Handling of Network Failure**

The Sendbox is designed to detect a network failure and pause its processing until the connection problem is resolved.

- **Support for Multiple Users**

Distributed Kofax e-Transactions users can work on the same documents due to a robust lock-and-release mechanism, or you can filter documents to be viewed only by the users who printed them.

Support for Unicode Characters

Kofax e-Transactions 2.5 builds on the Unicode compliance first introduced in Kofax e-Transactions 2.0 Service Pack 1.

- **Sendbox Application**

The improved Sendbox application for Kofax e-Transactions Sender can display Unicode text in the columns of its main view, and in the Display Document window.

- **Sender Company Data**

You can now type Unicode (non-Latin) characters when specifying company data in the Kofax e-Transactions Sender Settings application so they are included in the agreement that is sent to the Receiver application.

Sendbox Status Confirmations

In Kofax e-Transactions 2.5 you can view the Receiver-side status of a document within the Sendbox application. This status is communicated to the Sendbox via an unattended POP3 email account set up by the sending organization.

Improved Status Information in Receiver Inbox

In Kofax e-Transactions 2.0 Service Pack 1, a document is given a “valid” status before the Receiver application has attempted to export it to a Kofax Capture batch. If there are problems when creating the batch, the status of the document in the Receiver Inbox is not updated.

In Kofax e-Transactions 2.5, the status in the Receiver Inbox and document archive accurately reflects whether each document is received, exported, or in an error state.

Simplified Sender Configuration

The steps required for configuring Kofax e-Transactions Sender have been simplified and represented as a checklist in the Settings application. This replaces the Wizard and Diagnostics windows that are present in Kofax e-Transactions 2.0 Service Pack 1.

Changes in Behavior

The following behaviors have changed in Kofax e-Transactions 2.5.

Multiple-Document EDI Files Now Sent Separately

In Kofax e-Transactions 2.0 Service Pack 1, an EDI text file that contains multiple EDI documents is treated as a single email package when it is sent from the Sender to the Receiver application. In Kofax e-Transactions 2.5, the multiple-document file is separated before it arrives in the Sendbox application, and from that point onwards the documents are treated and emailed separately. This change does not affect how data is processed.

Change to the Receiver Service

In Kofax e-Transactions 2.0 Service Pack 1, the Receiver service performs retries on problematic documents and shuts down after several attempts. In Kofax e-Transactions 2.5, documents that encounter problems are placed into an “error” state and the service moves on to process the next document in the Inbox. Once the cause of the problem has been found and rectified, the document can be re-exported so the service can successfully submit the document to Kofax Capture.

Unsupported Fonts in PDF Documents Now Handled Correctly

Kofax e-Transactions does not support text formatted with embedded True Type fonts (usually found in PDF documents). In earlier versions of the product, these fonts are not detected and lead to inconsistent errors at configuration and production time. Kofax e-Transactions 2.5 detects and handles these fonts as follows:

- Unsupported text is not available for mapping in the template designer, and documents containing only unsupported text cannot be opened for configuration.
- Unsupported text is not included in the full page text representation associated with the document.
- Documents containing unsupported text can be processed at production time, but a warning is written to the Sender log.

This resolves SPR00054143.

Change to Resend Behavior

In Kofax e-Transactions 2.0 Service Pack 1, the Sendbox user can select from two options when resending documents from the Sent Items tab. The first is to resend the document immediately, and the second option is to move the document to the Outgoing tab.

In Kofax e-Transactions 2.5 only the latter option is available to simplify the user experience. The new design enforces the concept that after a user performs this action, a document's status is reset to that of a newly created document. Users can add data, enclosures, or a digital signature before resending the document and tracking its new status alongside those that were sent for the first time. This resolves SPR00047036.

No Restrictions When Opening the Sendbox

In Kofax e-Transactions 2.0 Service Pack 1, opening the Sendbox application before it has been configured results in the Settings application being displayed with limited options. The behavior in Kofax e-Transactions 2.5 has changed so the Sendbox application can now be opened without prior configuration. In addition, you can no longer open the Settings application from within the Sendbox application, and opening the Settings application from a client computer is not supported. This resolves SPR00046637.

Document Transports

In Kofax e-Transactions 2.0 Service Pack 1, document transports are used only for sending documents via FTP and specific types of email server.

In Kofax e-Transactions 2.5, document transports are central to Sender configuration and are required for every action that involves electronic transmission of data. This includes:

- **Documents and Agreements**

Documents and electronic agreements are sent using the document transport associated with your receiving organization.

- **Error Notification Emails**

You can set up a document transport to notify a sender's email address in the event that any errors occur at production time. This feature is now optional.

- **Support Emails**

You can set up a document transport to send an email to the organization providing support.

Invalid Documents No Longer Sent Immediately

When using the "Send Immediately" option to bypass the Sendbox application in Kofax e-Transactions 2.0 Service Pack 1, documents are sent regardless of whether they are valid or

invalid. In Kofax e-Transactions 2.5, invalid documents are not sent immediately and must be sent manually. This gives the sending organization an opportunity to review invalid documents before they are sent to the receiving organization.

Note Documents are marked invalid if they are missing required data, or if the data is in an unsupported format. For more information, refer to the *Kofax e-Transactions Sender User's Guide*.

Changes to the Structure of EDI Definition Files

The EDIFACT/X12 definition (.edf) file structure expected by Kofax e-Transactions Sender has been standardized. Definition files that are currently in use with earlier versions of the product must be reviewed by Kofax Professional Services before deployment in production with Kofax e-Transactions 2.5, because out-of-date or incorrectly used mapping code will have a greater impact on data integrity in this version.

Body of Reply Email Rendered in Multiple Formats

In Kofax e-Transactions 2.0 Service Pack 1, you can specify whether you require reply emails to be rendered in plain text or HTML format. In Kofax e-Transactions 2.5, each reply email is sent with both a plain text and HTML body so it can be appropriately rendered by the email client, and the option is now removed from the Sender Settings application.

Resolved Problems

The following problems have been resolved in Kofax e-Transactions 2.5.

Moveable Fields Feature Now Works Correctly

The moveable fields feature in the Sender template designer enables you to specify fields that may shift position on the document. This is useful for extracting fields such as the total amount field on an invoice, which can shift vertically depending on the number of line items.

In Kofax e-Transactions 2.0 Service Pack 1, the configuration of the anchor and target is lost when the template is saved. This problem is now resolved. (SPR00053190)

Print Processor Now Registered Correctly

In Kofax e-Transactions 2.0 Service Pack 1 under some circumstances, you are unable to install a virtual printer or activate a printer for Kofax e-Transactions. The following message may also be displayed: "There was a problem connecting to the print spooler." This is caused by the Kofax e-Transactions print processor failing to register during installation. This problem is now resolved. (SPR00051471)

Now Possible to Uninstall From Non-Default Location

Kofax e-Transactions 2.0 Service Pack 1 cannot be uninstalled after it is installed to a non-default location (the default location is C:\Program Files\Kofax\e-Transactions\). When you attempt to uninstall the program, an error occurs and neither the file nor registry entries are removed. This problem is now resolved. (SPR00052855)

Daily Transactional Report Now Sent Correctly

In Kofax e-Transactions 2.0 Service Pack 1, the daily transactional report (summarizing all the transactions that took place in the last twenty-four hours) is not always sent from the Receiver application. This problem is now resolved. (SPR00049912)

Now Possible to Configure a Template in a Chinese Locale

Kofax e-Transactions Sender is supported on a computer running an English Windows operating system but with the locale set to Chinese. In Kofax e-Transactions 2.0 Service Pack 1, the template designer occasionally fails to load the internal wizard file and it becomes impossible to configure the current document. This problem is now resolved. (SPR00064632)

Problems with Symbol-Formatted Excel Cells Now Resolved

Data in Microsoft Office Excel documents can be formatted in a way that appends a symbolic character to the value in a cell, such as the Euro (€) or percentage (%) characters. In Kofax e-Transactions 2.0 Service Pack 1, this can cause misleading behavior in the template designer, including problems where the specified alignment does not persist. This problem is now resolved. (SPR00065018)

Additional Characters Now Supported for X12 Text Files

In Kofax e-Transactions 2.0 Service Pack 1, the following characters are not supported in X12 text (.txt) files that you import to the Sender:

? : < > / * \

This problem is now resolved. (SPR00038703)

“Number of Copies” Template Option No Longer Restricts Access to Documents

In Kofax e-Transactions 2.0 Service Pack 1, there is a problem in the Sender template designer if the “number of copies” option for the template is set to a greater number of pages to that of the specific document you are trying to view. This problem is now resolved, and you can view any document while preserving the “number of copies” option for the template. (SPR00047330)

Document with No Document Number Now Displays in Sendbox

A document that is missing a document number should display in the Sendbox application if the Document Identifier and Receiver ID are located. In Kofax e-Transactions 2.0 Service Pack 1, there is a problem updating the database in this situation, which results in a log error and no document arriving in the Sendbox. This problem is now resolved, and documents that are missing a document number display in the Sendbox with an invalid status. (SPR00052238)

Approval Email No Longer Sent to Sender Before Sender is Approved

When receiving an agreement proposal for the first time, the Receiver application prompts the user to approve the agreement and assigns the sender a status of “new.” In Kofax e-

Transactions 2.0 Service Pack 1, if a subsequent agreement proposal arrives in the Inbox, an email is sent to the sending organization stating that they have been approved. This problem is now resolved, and an approval email is only sent if the sender's status is "approved" in the Receiver application. (SPR00065720)

Unprocessed Item Notification Email Now Sent Correctly

In the Receiver Settings you can specify an email address to receive a notification email when an unprocessed item is detected in the inbox. In Kofax e-Transactions 2.0 Service Pack 1, this feature does not work correctly, and the notification email is not sent. This problem is now resolved. (SPR00064622)

Misleading Email No Longer Sent to Sender when Agreement is Received

In Kofax e-Transactions 2.0 Service Pack 1, there is a problem with the feature that sends a notification email to the sending organization when their agreement is received and awaiting approval. If a notifications address is also configured in the Receiver Settings, a misleading email is sent to the sending organization informing them that a user must take some action. This problem is now resolved. (SPR00064624)

English (US) Language Now Available After Template Wizard Ends

When creating a template you are prompted to select the language during the configuration wizard. You can change the language at a later time using the drop-down list box in the template designer window. In Kofax e-Transactions 2.0 Service Pack 1, this feature works for most languages but English (US) is available only within the wizard, and is not present in the drop-down list box in the template designer window. This problem is now resolved. (SPR00057887)

Now Possible to Add Virtual Printer First in Printing tab

In Kofax e-Transactions 2.0 Service Pack 1, you are unable to add a virtual printer using the right-click menu on the Printing tab when there are no other printers on your computer. This problem is now resolved. (SPR00048873)

Required Restart of the Kofax e-Transactions Service Now Documented

After you configure Kofax Capture user profiles on the Exports tab, you must restart the Kofax e-Transactions service from the Monitoring tab for the changes to take effect. The need to restart the service is not documented in the *Kofax e-Transactions Receiver User's Guide* for Kofax e-Transactions 2.0 Service Pack 1. This problem is now resolved. (SPR00047429)

Known Problems

This section contains information about potential problems that you may encounter while using Kofax e-Transactions 2.5.

Batch Export Occasionally Fails During Processing

Kofax e-Transactions Receiver occasionally fails to create batches in Kofax Capture. The documents are given an error status and the Receiver log file contains the text "LEAD Error:

Not enough memory available”, even if the computer satisfies the system requirements documented in the *Kofax e-Transactions Receiver Installation Guide*. This occurs when there is too little virtual memory available to Kofax e-Transactions when a particular batch is being exported, a situation that is more likely on a computer where memory-intensive programs such as SQL Server are running. (SPR00065927)

Workaround: Restart the Kofax e-Transactions service, and then manually re-export the error documents from the document archive.

Problems When Installing Version 2.5 on the Same Computer as Version 1.0

There is no pre-installation check to prevent Kofax e-Transactions 2.5 from being installed on the same computer as Kofax e-Transactions 1.0. If you do so, various problems may occur, including a fatal error when attempting to uninstall the earlier version. (SPR00047083)

Workaround: Always uninstall Kofax e-Transactions 1.0 before installing Kofax e-Transactions 2.5.

Problems When Using Different Sender and Receiver Versions

If the Sender and Receiver versions are not from the same released version of Kofax e-Transactions, you will observe problems including documents displaying with incorrect document type and data values in the Receiver Inbox. For example, the Kofax e-Transactions 2.5 Sender application is not compatible with the Kofax e-Transactions 2.0 Receiver application. This is due to the fact that the Sender and Receiver applications are closely integrated, and many features involving two-way communication were redesigned between version 2.0 and version 2.5.

Workaround: The sending organization should download and install the free Sender application that corresponds to the version of the Receiver application being used.

Processing a Combination of EDI and Printed Documents Yields Unpredictable Results

Unpredictable results may occur when you use Kofax e-Transactions to process both EDI and printed documents at the same time or change from an EDI Capture configuration to an Electronic Transaction configuration. (SPR00045371 and SPR00047400)

Workaround: Configure Kofax e-Transactions for the specific solution you require. If you notice problems, uninstall and then reinstall the software.

Problems When Starting the Receiver Application After Using Scheduled Intermission

In some circumstances, you cannot start the Receiver application after using the scheduled intermission feature (that is configured on the Monitoring tab of the Receiver Settings window). (SPR00044537)

Workaround: Use the following procedure to disable the scheduled intermission in the registry.

Note Do not edit the registry unless you are qualified to do so. You can easily render your system inoperable if you inadvertently corrupt the registry.

► **To disable the scheduled intermission in the registry**

1. On the Windows taskbar, click Start, and then click Run.
2. Type `regedit` and press Enter.
The registry editor is displayed.
3. Browse to the following registry key:
`HKEY_LOCAL_MACHINE\SOFTWARE\Kofax\ e-Transactions\Receiver`
4. Edit the string value that enables or disables the scheduled intermission as follows:
 - a. In the right-hand panel, select the string value `36`.
 - b. Double-click the string value.
The Edit String window is displayed.
 - c. In the Value data box, change the value from `1` to `0`.
5. Restart your computer.

Same Receiver Licensing Error Message Is Displayed In Several Situations

When opening the Kofax e-Transactions Receiver application, the message “Your transaction count has reached zero and your license has expired” is displayed in the following situations:

- There are no transactions remaining on the Kofax e-Transactions license.
- The license hardware key is not attached or activated.
- A Kofax e-Transactions license is not present on the license hardware key.
- The Kofax e-Transactions or Kofax Capture Service is not running.

It is therefore not clear which one of these factors is causing the problem. (SPR00044730)

Workaround: If this message is displayed, check all of the previously-listed factors (in the order specified) to see which one is causing the problem.

Problems When Uninstalling Receiver Without Stopping the Kofax e-Transactions Service

If you uninstall the Receiver application without stopping the Kofax e-Transactions service, the service continues to run after the application is uninstalled. This causes problems when installing additional Kofax e-Transactions components. (SPR00046676)

Workaround: Stop the Kofax e-Transactions service before uninstalling the Receiver application.

Kofax e-Transactions Service Does Not Start After Installation If Kofax Capture License Is Not Activated

When installing the Receiver application on a computer where the Kofax e-Transactions license is not present on the Kofax Capture hardware key (or the hardware key is not activated), the Kofax e-Transactions Service is not started when the installation is complete. (SPR00046921)

Workaround: Start the service manually from the Receiver Settings window.

Some Characters Do Not Display Correctly in the Kofax e-Transactions Interface

There is a problem displaying some Unicode data in the Kofax e-Transactions interface (Sender template designer and Company Data window, Receiver Inbox and Senders window), even if the locale for the computer is set appropriately. This problem occurs if the character lies outside the ANSI_CHARSET character set, such as a Japanese katakana character. (SPR00064799)

Workaround: Use the following procedure to change the character set used by Kofax e-Transactions in the registry.

Note Do not edit the registry unless you are qualified to do so. You can easily render your system inoperable if you inadvertently corrupt the registry.

► To change the character set used by Kofax e-Transactions

1. Close all Kofax e-Transactions applications.
2. On the Windows taskbar, click Start, and then click Run.
3. Type `regedit` and press Enter.
The registry editor is displayed.
4. Browse to one of the following registry keys:
HKEY_LOCAL_MACHINE\SOFTWARE\Kofax\e-Transactions\Sender
HKEY_LOCAL_MACHINE\SOFTWARE\Kofax\e-Transactions\Receiver
5. Edit the string value that changes the character set as follows:
 - a. In the right-hand panel, select the string value 52.
 - b. Double-click the string value.
The Edit String window is displayed.
 - c. In the Value data box, change the value to *<Character Set Value>*.
For example, Kofax e-Transactions can support Japanese katakana characters if you change the value to 128.

Table 1.1. Available Character Sets

| Character Set Name | Value |
|---------------------|-------|
| ANSI_CHARSET | 0 |
| DEFAULT_CHARSET | 1 |
| SYMBOL_CHARSET | 2 |
| SHIFTJIS_CHARSET | 128 |
| HANGEUL_CHARSET | 129 |
| GB2312_CHARSET | 134 |
| CHINESEBIG5_CHARSET | 136 |

| Character Set Name | Value |
|--------------------|-------|
| OEM_CHARSET | 255 |
| JOHAB_CHARSET | 130 |
| HEBREW_CHARSET | 177 |
| ARABIC_CHARSET | 178 |
| GREEK_CHARSET | 161 |
| TURKISH_CHARSET | 162 |
| VIETNAMESE_CHARSET | 163 |
| THAI_CHARSET | 222 |
| EASTEUROPE_CHARSET | 238 |
| RUSSIAN_CHARSET | 204 |
| MAC_CHARSET | 77 |
| BALTIC_CHARSET | 186 |

6. Close the registry editor.

Printer Wizard Can Configure Only One Printer

After the first printer is configured using the printers wizard on the General tab of the Kofax e-Transactions Sender Settings application, no further printers can be configured and navigation through the wizard becomes confusing. (SPR00047096)

Workaround: Configure additional printers using the Printing tab in the Sender Settings application.

Problems When Viewing Coordinates for Closely Grouped Line Item Data

If an invoice document contains line item data that is closely grouped together, the field coordinates are not always written correctly to the XDocument by Kofax e-Transactions Receiver, and you may observe missing coordinates for this data in Kofax Transformation Modules - Validation. (SPR00066957)

Workaround: Use a script to calculate whether line item co-ordinates overlap and if this is the case, subtract the difference from the line item co-ordinates.

Unicode Encoded EDI Files Cannot Be Processed

If an EDIFACT/X12 configuration and/or import file is saved as UTF-8, Unicode, or Unicode big endian, the import file cannot be processed by Kofax e-Transactions Sender, and an error is generated in the log.txt file located in the Sender folder. (SPR00038705)

Workaround: Save the text file with ANSI encoding and ensure the locale of your computer is set to interpret the ANSI characters in the configuration and/or import files.

Field Recognition for Microsoft Office Word Documents Gives Unpredictable Results

Microsoft Office Word documents are supported but may give unpredictable results based on how they are edited. (SPR00046967 and SPR00037630)

Workaround: Use Kofax e-Transactions to identify and transfer Microsoft Office Word documents, but use Kofax Transformation Modules to extract meaningful data from the documents.

New Agreement Required for Additional Receiver ID

In the Sender Settings application, adding a new Receiver ID to an organization that already has an agreement in place should not require you to send a new agreement, since no company data or confirmation options have changed. However, you are unable to send documents with this new Receiver ID from the Sender Sendbox application, and the documents are assigned an error status with the message that no agreement has been established. (SPR00066168)

Workaround: Establish a new agreement from the Sender Settings application.

New Agreement Required After Upgrade

If you upgrade Kofax e-Transactions Sender from an earlier version, the documentation states that agreements are preserved. However, you are unable to send documents from the Sender Sendbox application following an upgrade, and the documents are assigned an error status with the message that no agreement has been established. (SPR00066225)

Workaround: Establish a new agreement from the Sender Settings application.

No Context Menu Available in Template Designer

If you right-click a document in the Configuration tab of the Sender Settings application and click "Configure document", no context menu is available during your session within the template designer. (SPR00066284)

Workaround: Open the document for configuration by clicking the Configure button on the Configuration tab.

Additional Resources

This section provides information regarding related documentation, training, and Kofax Technical Support.

Related Documentation

These release notes are a supplement to the following Kofax e-Transactions documentation:

- *Kofax e-Transactions Receiver Installation Guide*
- *Kofax e-Transactions Receiver User's Guide*
- *Kofax e-Transactions Getting Started Guide (EDI Capture)*
- *Kofax e-Transactions Receiver Help*
- *Kofax e-Transactions Sender Installation Guide*
- *Kofax e-Transactions Sender User's Guide*
- *Kofax e-Transactions Getting Started Guide (Digital Signature)*
- *Kofax e-Transactions Sender Help*

Your Kofax e-Transactions documentation is available in your software package and from the Kofax Web site.

Tip For additional information about Kofax products, visit our Web site at www.kofax.com and go to the Technical Support pages. The Technical Support Web pages provide product-specific information, such as current revision levels, the latest drivers and software patches, technical tips, and a searchable knowledgebase. In addition, updates to product documentation (if any) are available from these pages.

Training

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

Technical Assistance for Your Kofax Product

This section provides information about technical assistance for the Kofax e-Transactions Sender and Kofax e-Transactions Receiver applications.

Kofax e-Transactions Sender

If you are using Kofax e-Transactions Sender at a sending organization, you must request support via the Support tab in the Kofax e-Transactions Sender Settings window. From this tab you can send information via email to the organization providing support for your Kofax e-Transactions software. This organization is usually the receiving organization to which you are sending documents.

► To request Sender support

1. In the Kofax e-Transactions Sender Settings window, click the Support tab.
2. Provide your Sender contact information.

This information is displayed in the signature of the email that you send to the support organization so that you can be contacted.

- a. In the Contact Person box, type your name.
- b. In the Email Address box, type your email address.

Support emails are sent from the same email address that you are using for automatic replies (that is configured on the Sendbox tab). However, the support organization will reply to the email address in the email signature if you specify it here.

- c. In the Phone No. box, type your telephone number.
3. From the Support Email Transport drop-down list box, select the email transport that you are using for support requests.

You can add a transport by clicking Add Transport (+) and using the wizard to set up an email transport. Provide details for the SMTP email server that you want to use to send the support request and the email address of the contact person at the organization providing support.

4. In the Kofax e-Transactions Sender Settings window, click Save.
5. Click Request Support.

A confirmation window is displayed.

6. Click Yes.
The Information window is displayed.
7. In the box, type a description of your software problem, and then click Send.
The Include Data window is displayed, prompting you to include additional data such as log file information to help the support organization address your request.
8. Click Yes.
An email is sent to the support organization along with additional files that are used to identify the problem.

Kofax e-Transactions Receiver

Support for your Kofax product is provided by your primary application support provider, which is specified as part of the maintenance agreement associated with your purchase. Please contact your Kofax application support provider for technical assistance.

For more information about your product, visit the Kofax Support pages at www.kofax.com for:

- Product information and release news
- Access to the Kofax Knowledgebase
- Access to the online Case Management System (for eligible customers)
- Downloadable product documentation

Before contacting your Kofax application support provider, please gather the following information where applicable:

- Product name, version, and serial number
- Log files
- Product license
- Exact error message(s)
- Reproduction scenario