

KOFAX Transformation Modules

Release Notes for Version 4.0



10001845-000
February 27, 2009

© 2006-2009 Kofax, Inc., 16245 Laguna Canyon Road, Irvine, California 92618, U.S.A. All right reserved. Portions
© 2002-2006 Kofax Development GmbH. Portions © 1997-2006 Kofax Development UK Ltd. All Rights Reserved.
Use is subject to license terms.

Third-party software is copyrighted and licensed from Kofax's suppliers.

This product is protected by U.S. Patent No. 5,159,667.

THIS SOFTWARE CONTAINS CONFIDENTIAL INFORMATION AND TRADE SECRETS OF KOFAX, INC. USE, DISCLOSURE OR REPRODUCTION IS PROHIBITED WITHOUT THE PRIOR EXPRESS WRITTEN PERMISSION OF KOFAX, INC.

Kofax, the Kofax logo, Ascent Xtrata Pro, INDICIUS, Xtrata, Kofax Transformation Modules, Ascent Capture, Kofax Capture, VirtualReScan, the "VRS VirtualReScan" logo, and VRS are trademarks or registered trademarks of Kofax, Inc. or its affiliates in the U.S. and other countries. All other trademarks are the trademarks or registered trademarks of their respective owners.

U.S. Government Rights Commercial software. Government users are subject to the Kofax, Inc. standard license agreement and applicable provisions of the FAR and its supplements.

You agree that you do not intend to and will not, directly or indirectly, export or transmit the Software or related documentation and technical data to any country to which such export or transmission is restricted by any applicable U.S. regulation or statute, without the prior written consent, if required, of the Bureau of Export Administration of the U.S. Department of Commerce, or such other governmental entity as may have jurisdiction over such export or transmission. You represent and warrant that you are not located in, under the control of, or a national or resident of any such country.

DOCUMENTATION IS PROVIDED "AS IS" AND ALL EXPRESS OR IMPLIED CONDITIONS, REPRESENTATIONS AND WARRANTIES, INCLUDING ANY IMPLIED WARRANTY OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE OR NON-INFRINGEMENT, ARE DISCLAIMED, EXCEPT TO THE EXTENT THAT SUCH DISCLAIMERS ARE HELD TO BE LEGALLY INVALID.

Contents

Kofax Transformation Modules Release Notes	1
Introduction	1
New Features	1
Multiple Instances of Server	1
Multiple Steps of Validation	1
Masked Areas in Validation	1
Trainable Group Locator	1
Specific Online Learning for Tables	2
Kofax Transformation Modules - Correction	2
Kofax Transformation Modules - Verification	2
Kofax Transformation Modules - Document Review	2
SQL Server Support for Statistics Release	2
Changes in Behavior	3
Advanced Zone Locator Registration	3
Knowledge Base Creation	3
Resolved Problems	3
Kofax Transformation - Project Builder	3
Kofax Transformation Modules - Server	5
Kofax Transformation - Validation	6
Kofax Transformation Modules - Knowledge Base Learning Server	6
Kofax Transformation - Knowledge Base Administration	6
Kofax Transformation - Synchronization	7
Kofax Transformation - Statistics Viewer	7
Kofax Capture Integration	7
General Localization	7
Known Problems	8
Installation	8
Kofax Capture 8 Features	8
Export Kofax Capture Batch Class	9
Project Builder	9
Project Planner	9
Validation	10
Correction	10
Document Review	11
Statistics Viewer	11
Synchronization Tool	11
OCR Engines	11
Related Product Information	12
Script Considerations for Earlier Projects	12
Project Planner Professional Add-On	14
Support for INDICIUS Configurations	14

Additional Information 16
 Related Documentation 16
 Technical Support 17
 Training 18

Kofax Transformation Modules Release Notes

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.

New Features

The following new features have been added to Kofax Transformation Modules 4.0.

Multiple Instances of Server

With Kofax Transformation Modules 3.5, Server could only be used once in a queue, performing classification and extraction in a single step. With Kofax Transformation Modules 4.0, two Server instances are possible.

This means document classification and batch structure can be reviewed before extraction is performed. This new feature can increase productivity in higher volume classification and extraction systems.

Multiple Steps of Validation

With Kofax Transformation Modules 3.5, Validation could only be used once in a custom queue. With Kofax Transformation Modules 4.0, multiple steps are possible, with different data or the same data displayed in each step.

This new feature can increase data security.

Masked Areas in Validation

You can now define masked areas on a document to hide information from operators in Validation. Masked areas appear in black or white (to hide a social security number from operators who validate only address data, for example). This feature can be used with multiple validation steps.

Trainable Group Locator

With Kofax Transformation Modules 3.5, trainable extraction was only available for a predefined set of invoice fields using the Field Group Locators. With Kofax Transformation Modules 4.0, trainable extraction and Online Learning are possible for any field on a document using the Trainable Group Locator.

Up to 30 subfields can be configured for each Trainable Group Locator. Multiple instances of a Trainable Group Locator can be assigned to each class.

The Trainable Group Locator supports the following features found in the Invoice Group Locators:

- Regions
- Generic and specific learning
- Formatters and validation methods for each subfield

This new feature can increase ease of use for non-invoice systems.

Specific Online Learning for Tables

With Kofax Transformation Modules 3.5, specific online learning was only available for invoice header fields. With Kofax Transformation Modules 4.0, specific online learning is also available for any table type that does not require registration.

You can use table auto-complete in Validation and the Knowledge Base Learning Service automatically learns the table layout so it can be used to extract the line items from the next document from the same class in the next batch. This new feature can increase productivity and ease of use for both invoice and mailroom systems.

Kofax Transformation Modules - Correction

Correction is a new module that allows individual characters that are extracted using an Advanced Zone Locator to be corrected. Like the Validation module, Correction is configured from Project Builder.

In Correction, you will see only the previous field (optional), current field and next field (optional). This new module can increase productivity in high-volume forms processing systems.

Kofax Transformation Modules - Verification

Verification is a new module that compares keyed data to existing data. This data can be extracted automatically or keyed by another user in a previous step. Any differences in the data can be flagged.

This new module can increase data accuracy.

Kofax Transformation Modules - Document Review

Document Review is a new module that allows document classification results and batch structure to be reviewed and modified. Like the Validation module, Document Review is configured from Project Builder.

Document Review is typically added to a custom queue after the first instance of Server. This new module can increase productivity in higher volume classification and extraction systems.

SQL Server Support for Statistics Release

With Kofax Transformation Modules 3.5, statistical data could only be written to a Microsoft Access database. Using this type of database caused performance issues when writing to the database over a network or from multiple release scripts (typical in higher volume systems).

With Kofax Transformation Modules 4.0, statistical information can be released to an SQL server. This new feature can increase flexibility and productivity.

Changes in Behavior

The following changes have been made to the behavior of Kofax Transformation Modules 4.0.

Advanced Zone Locator Registration

The Advanced Zone Locator has new properties on the registration tab, providing better control over registration with the following additional settings:

- Global registration can be applied to an entire page using a combination of lines, OCR results, and layout to adjusted zones for a shifted, stretched, or deskewed document.
- Local Registration runs a second time within a zone to perform additional local registration. This additional registration can improve the registration result but requires additional time.

Knowledge Base Creation

You can now create and enable knowledge bases at the class level for all trainable locators, including the Invoice Group Locator, Amount Group Locator, Order Group Locator, Trainable Group Locator, and Trainable Table Locator. The Knowledge Base tab has been removed from the Project Settings window, and all trainable locators now have a Knowledge Base tab within their respective properties window for configuring knowledge bases.

Resolved Problems

The following problems have been resolved in Kofax Transformation Modules 4.0.

Kofax Transformation - Project Builder

The following section contains details about resolved problems in Project Builder.

Test Documents with a UNC Path

Test documents located on a networked drive can now be referenced using a UNC path. It is no longer necessary to map the network drive. (SPR00021573)

Case Sensitive Dictionary Names

Dictionary names are no longer case-sensitive. (SPR00026303)

Table Locator Improvements

Optional lines are now deleted when the Master Item is deleted. (SPR00033113)

When the Master Item of a table is resized, any excluded cells are now deleted as expected. (SPR00031782)

Table cells can now be updated or changed from script. (SPR00040242)

Configuring Table Fields

Multiple validation rules can now be added to table fields. (SPR00033845)

When assigning a table model to a table field, the model must now contain at least one column. (SPR00033990)

The inheritance of table field formatting to subclasses is now persistent. (SPR00034329)

Validation Form Design Improvements

Group labels and tabs now behave correctly when designing a validation form. (SPR00036922)

The field property focus now updates correctly with the addition and deletion of fields on the validation form. (SPR00037765)

Selecting Add Page while in Test Validation on a multi-page TIFF behaves as expected. A duplicate first page is no longer imported. (SPR00033716)

After items are ungrouped when designing the validation form, the tab sequence is now updated to reflect the changes. (SPR00035203)

You can freely place tables on a validation form and any lengthy table cell text will now automatically wrap. (SPR00028331)

Format Locator Regular Expressions

Format Locators can now have regular expressions with an unlimited number of characters. (SPR00037772)

Folder and Class Names and Inheritance

Renaming a parent class or folders now automatically checks all subclasses and subfolders to ensure that no naming duplication occurs. (SPR00039573)

Project Builder Viewing Parameter Shortcut

A shortcut for viewing parameter information when editing a script in Project Builder (Ctrl+I) is now available. (SPR00039974)

Amount Group Locator Currencies

Amount Group Locators now return an empty Currency value when there is no currency on the document field. (SPR00040233)

Validation Rule Names

A warning message is now displayed when you attempt to add a Validation rule with the same name as an existing rule. (SPR00042199)

OCR Voting Evaluator Field Data

The extraction result (character information) is now passed to the field when you use an OCR Voting evaluator. (SPR00042333)

Classification Locator Improvements

A Classification Locator can now also reference a project that includes an Advanced Zone Locator for scripted classification. All necessary files are now copied into the project directory so that the Advanced Zone Locator can be correctly executed during classification. (SPR00042393)

Database Locator Improvements

The “Select a database with records which should not be found by this locator” database locator option can now be set to “none” without compromising batch processing. (SPR00042774)

Training Documents

Multiple documents can now be trained in a single action. (SPR00042864)

Exiting Test Validation

Test Validation now exits successfully if it is closed before an image has fully loaded. (SPR00037376)

Database Lookup Navigation

The Database Lookup window now has a horizontal scrollbar so you can access columns that exceed the width of the window. (SPR00042387)

Kofax Transformation Modules - Server

The following section contains details about resolved problems in Server.

Script Reclassify Function

The Reclassify() function is now called a second time when a rejected document that had its class changed in Quality Control is processed by Server a second time. (SPR00034363)

Server Log Improvements

The extraction server log now records the number of extracted fields in a batch. (SPR00034499)

The Server log now displays the correct sequence of numbers for each action taken when processing a batch through Server. This is also true for computers running multiple steps of Server. (SPR00025470)

Server Access

The error message sent to users who do not have the necessary permissions to run the Server module now provides appropriate information about the security of Server.

Image Path with DOS Shortname

Batches containing image paths in the DOS shortname format can now be loaded by Server. (SPR00033515)

Parent Folders in Script

Parent folders for Xdocs are now available during separation in script. (SPR00039397)

Binary Characters in 2D Barcodes

Binary characters in two-dimensional bar codes are now replaced with line feed characters to ensure that the XML string does not contain illegal characters. (SPR00042633)

Kofax Transformation - Validation

The following section contains details about resolved problems in Validation.

Validation Scripting Events

The “AfterTableRowAdded” and “BeforeFieldGotFocus” Validation script events are now only fired once when a row is inserted into a table using script. (SPR00040478)

The “ValidationForm_AfterFieldChange” script event is now only fired if a field value is manually changed by a Validation operator. It is no longer updated when a script changes the field value. (SPR00042132)

Manually Classifying a Document with a Script

Fields on a tab hidden by scripting no longer affect a batch when a document is manually classified in Validation. (SPR00043505)

Validation Accelerator Keys

Each Validation operation now has a unique accelerator key sequence. (SPR00028331)

Error Handling for Custom Storage Strings

Exception handling has been added for UTF-7 encoded custom storage strings. (SPR00042133)

Validation Status Bar

The number of pages for the current document and the total number of documents and pages in a batch are now displayed on the status bar of the Validation module. (SPR00039065)

Kofax Transformation Modules - Knowledge Base Learning Server

The following section contains details about a resolved problem in Knowledge Base Learning Server.

Folder Support

Documents in folders are now successfully processed by the Knowledge Base Learning Server module. (SPR00043984)

Kofax Transformation - Knowledge Base Administration

The following section contains details about resolved problems in Knowledge Base Administration.

Training Set Navigation

After you add documents to the training set in Knowledge Base Administration, training data is now populated when you navigate between documents. (SPR00025762)

Previous Document and Next Document navigation is now disabled on the Knowledge Base tab in Knowledge Base Administration. (SPR00026168)

Knowledge Base Administration Accelerator Keys

Each action in Knowledge Base Administration has a unique accelerator key sequence (SPR00026573 and SPR00026574).

Kofax Transformation - Synchronization

The following section contains details about resolved problems in the Synchronization tool.

Class and Field Names

Class and field names cannot be added if their name contains more than 32 characters. A warning is now provided to stop this from happening (SPR00026353).

Class Sort Order

The class sort order in the Synchronization tool matches the class sort order in Project Builder. (SPR00026436)

Kofax Capture Class Synchronization

Classes and folders can now be synchronized to their corresponding Kofax Capture classes and folders. (SPR00032265)

Table Index Fields

Index fields can now be created for table fields. (SPR00025430)

Kofax Transformation - Statistics Viewer

The following section contains details about resolved problems in the Statistics Viewer.

Daily Statistics

The Daily Statistics pie chart now provides the correct information in Statistics Viewer. (SPR00025752)

Report Calculations

Empty entries are now included in report calculations. (SPR00033133)

Kofax Capture Integration

The following section contains details about a resolved issue with Kofax Capture Integration

Kofax Capture and Scripting

Kofax Capture batch field values are now available from script during document separation. (SPR00039825)

General Localization

Missing or incorrectly localized text has been resolved (SPR00038555, SPR00040075, SPR00040121, SPR00040587, SPR00038712, SPR00038307, SPR00038453, SPR00038707, SPR00038975, and SPR00041511).

Known Problems

The following sections describe known problems, and if available, useful workarounds for Kofax Transformation Modules 4.0.

Installation

The following are known issues with Kofax Transformation Modules installation:

Crystal Reports Installation

The KTM_Installer.msi does not automatically install Crystal Reports when Kofax Transformation Modules is installed. If you install Kofax Transformation Modules using this installer and then attempt to run Statistics Viewer to run reports, you will receive an error. (SPR00044039)

Workaround: Use the executable installer to initially install the software as it does install Crystal Reports. If you see this error after Kofax Transformation Modules has already been installed using the .msi file, install Crystal Reports manually.

Installing the Chinese, Japanese, and Korean Engine on Vista

Installing the CJK engine on a Windows Vista operating system even when logged in as an administrator causes an error. (SPR00044437)

Workaround: Right-click on the executable and select Run as Administrator.

Uninstalling the CJK Engine

CJK 8.1 cannot be uninstalled using Add/Remove Programs for Windows Vista or Windows Server 2008. (SPR00044436)

Workaround: Re-run the setup.exe to uninstall the CJK.

Installing Project Planner

Project Planner can only be installed on an English operating system. (SPR00044228)

Kofax Capture 8 Features

Kofax Capture 8 features are supported except for those described in the following sections:

Kofax Capture Network Server and Kofax Transformation Modules Online Learning

There is no restriction in using Kofax Capture Network Server with Kofax Transformation Modules if Online Learning is not enabled. If it is enabled then Kofax Transformation Modules - Server and Knowledge Base Learning Server must be executed on the same site, because both applications must have access to the same Online Learning directory. If necessary, you can change the path settings for Online Learning in the Project Builder.

Copy and Paste

Copying and pasting batch classes and document classes in the Kofax Capture Administration module causes unpredictable mappings between these objects and Kofax Transformation Modules objects. You cannot use this feature if any Kofax Transformation Modules added to a queue.

Export Kofax Capture Batch Class

If a Project Builder project is open when the Synchronization tool is used in the Kofax Capture Administration module, the export will be incomplete and unpredictable errors may occur. (SPR00037704)

Workaround: Close the project in Project Builder before you export the batch class.

Project Builder

The following are known issues with Project Builder:

Deleting Groups in the Validation Form Layout

The Delete key does not delete a selected control if the control is placed on a group box. (SPR00044339)

Workaround: Delete the selected control using the toolbar Delete option.

Adding Controls to a Group

Adding controls to a group box when designing the validation layout deselect the group so that subsequent controls cannot be added to the group. (SPR00044340)

Workaround: Ensure that the group is selected each time you add a control.

Non-ASCII Characters in TDS Class Names

Trainable Document Separation class names with non-ASCII characters are imported incorrectly into Project Builder. (SPR00044460)

Workaround: Ensure TDS class names use only ASCII characters before importing them into Project Builder.

Referenced Classifier Type

When importing a TDS model or opening a project containing a TDS model, an error saying, “The referenced classifier type ADSPageTextClassifier is not registered can be encountered”.

Workaround: Perform a “Repair” operation on the KTM installation to re-register the classifier type. (SPR00044657)

Project Planner

The following are known issues with Project Planner:

Help After Using the Import Feature

The Help does not launch after the Import feature is used. (SPR00044396)

Workaround: Restart Project Planner or manually open the Help .chm file from the installation location.

Non-ASCII Project Names

An error occurs when you try to create a project name that contains non-ASCII characters. (SPR00044453)

Workaround: Only use ASCII characters when naming a project.

Projects in Compressed Folders

Creating a project in a compressed folder causes an error. (SPR00043877)

Workaround: Do not create or save a project in a compressed folder.

Image Viewer Problems

After installing Kofax Transformation Modules, you may encounter problems viewing images in the Image Viewer. (SPR00043931)

Workaround: After Kofax Transformation Modules has been installed, restart the computer.

Validation

The following are known issues with Validation:

Kofax Capture Timeout

If a batch opened in Validation loses connection with Kofax Capture, (for example, because Kofax Capture has timed out), you cannot close or suspend the batch, even if you click OK for the displayed error message. (SPR00036923)

Workaround: Open Windows Task Manager and stop the Validation application, then reopen the batch from within the Batch Manager module.

Validation Timeout

If a batch opened in Validation is left idle for several hours (for example, overnight), you cannot close or suspend the batch without an error. (SPR00036917)

Workaround: Open Windows Task Manager and stop the Validation application, then reopen the batch from within the Batch Manager module.

Tab Sequence Duplications

When ungrouping fields on the Validation Form Layout screen, the tab order can contain duplicates. This causes problems when you tab through the validation form.

Workaround: Reset the tab sequence by clicking Default on the Define Sequence window.

Table Column Default Sizes

After installation, table columns may be partially hidden and no slider is available. (SPR00043621)

Workaround: Resize the panels so that the table columns are visible.

Correction

The following is a known issue with Correction:

Advanced Zone Error

An error occurs in Correction when an advanced zone does not fit within the page dimensions. (SPR00044283)

Workaround: Draw zones inside the page boundary when configuring an advanced zone to be used for Correction.

Document Review

The following are known issues with Document Review:

Document Rejection Note Help

Pressing F1 from the Rejection Note window does not open the Help. (SPR00043008)

Workaround: Click the Help button on the Rejection Note window or select Contents from the Help menu.

Split Document Script Hook

The Split Document script hook (AfterSplitDocument) does not assign the new class to the new document. (SPR00044510)

Workaround: Manually reclassify the document after splitting.

Statistics Viewer

The following is a known issue with Statistics Viewer:

Database Selection

An error occurs when you generate a report with no database selected. (SPR00044517)

Workaround: Ensure that a valid database has been added before generating a report.

Synchronization Tool

The following is a known issue with the Synchronization Tool:

Adding Index Fields

Synchronization Tool can corrupt index fields when you run the Synchronization tool a second time to add index fields. (SPR00043525)

Workaround: Ensure that index fields are synchronized the first time the Synchronization tool is run.

OCR Engines

The following are known issues with OCR Engines:

RecoStar Asian Language Support

Even though the Recostar profile box provides an entry to read Asian languages, it does not support Asian languages. (SPR00039195)

Workaround: Use the FineReader engine to read Asian languages.

Related Product Information

The following section describes important information about Kofax Transformation Modules.

Script Considerations for Earlier Projects

The following section describes information about considerations needed for scripts created in earlier projects.

WinWrap Basic Script Engine

The WinWrap script engine has changes that you need to consider when using existing scripts. Any project with a script created using a version earlier than Kofax Transformation Modules 3.5 may have problems related to the following script issues:

Note No project upgrade warning is displayed in Project Builder when the project is opened, even if the script fails.

Initialization of Optional Parameters

With this script engine you can no longer use optional parameters that are initialized in a function or procedure call, such as in the following example.

```
Public Sub Test (pVal As String, Optional pVal2 as Date = Now)
...
End Sub
```

Instead, initialize the parameter, for example in the following way:

```
Public Sub Test (pVal As String, Optional pVal2 as Date)
  If IsEmpty(pVal2) Then
    pVal2 = Now
  End IF
End Sub
```

Different Error Tolerance

The WinWrap Basic engine does not allow some errors the old Sax Basic engine tolerated.

Not Tolerated Errors

Missing references

Invalid references, such as references to missing dlls, must be removed from a script. In Sax Basic it was possible to reference a missing dll as long as it was not used.

Wrong name space usage

Access to some COM objects from the CscXDocLib using the CascadeLIB name space is no longer possible for the new engine. With Sax Basic it was possible to write the following variable declaration:

```
Dim oMyTable as CascadeLib.CscXDocTable
```


Because the `CscXDocTable` object is defined in the `CscXDocLib` type library. Now, you have to use it the following:

```
Dim oMyTable as CscXDocLib.CscXDocTable
```

or

```
Dim oMyTable as CscXDocTable
```

This also applies to other objects in the `CscXDocLib` library.

Special Characters for Variable Names in Script

Script variable names can only contain a limited set of characters.

Valid characters for variable names:

- “ABCDEFGHIJKLMNOPQRSTUVWXYZ”
- “0123456789_”
- “abcdefghijklmnopqrstuvwxyz”
- “áâãäåöøùúûüèéêëîî”
- “äöüÄÖÜß”
- “ÁÀÂÃÄÅÖØÙÚÛÜÈÉÊËÎÏ”

Any other character is invalid as part of a variable name.

Note The underscore (“_”) was an invalid character in Kofax Transformation Modules 4.0 and earlier versions. In Kofax Transformation Modules 3.5 Service Pack 1, the underscore is now a valid character for script variable names.

A variable name can only start with an alphabetic character. This means that if an underscore or number is used as the first character, the variable name will be renamed.

In Kofax Transformation Modules 3.5, any invalid character in a variable name was omitted from the script. This means that a variable called “Field-New” would be called “FieldNew” in the script.

In Kofax Transformation Modules 3.5 Service Pack 1, a variable name that contains an invalid character will be substituted in the script. For example, “Field-New” will become “Field<n>” where n is the index number of the field based on its location in the Extraction Design.

The same is true for field names, script locators, script validation methods and script formatters.

When loading a project created with Kofax Transformation Modules 3.5 or earlier version, the script will automatically be updated if the variable name of any field, formatter, locator or validation method in script has changed due to the new script name mapping.

A project upgrade warning will be displayed in Project Builder when the project is opened to notify the user that the script was modified.

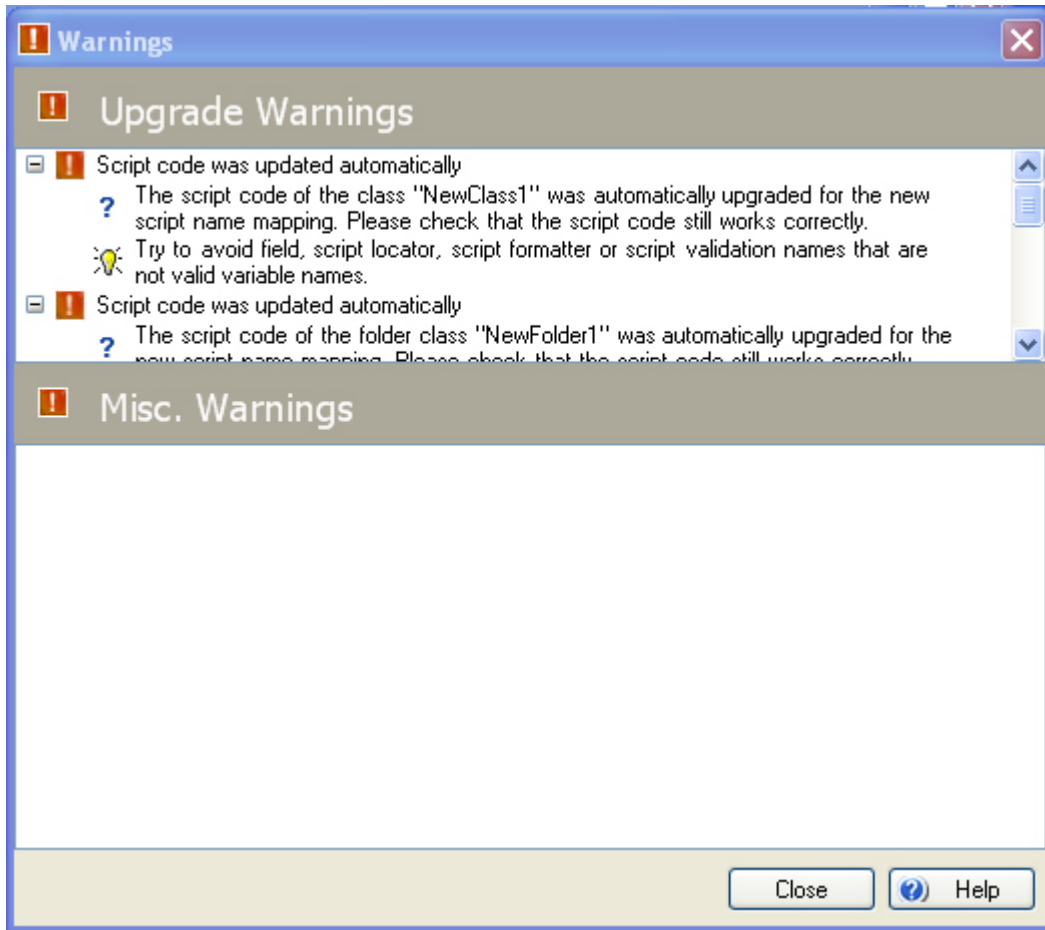


Figure 1.1. Upgrade Warning

In addition to a warning message, comments are added to script files explaining the change and the old syntax.

For example:

```
' Upgrade note: This method name was changed automatically to adjust it for the new script name
mapping
' Please check if the script even is still working correctly!
' Old syntax: <old method>

<Modified method>
```

Project Planner Professional Add-On

Note that Project Planner can only be installed on 32-bit English operating system.

Support for INDICIUS Configurations

Kofax Transformation Modules 4.0 is supported for use with INDICIUS, and custom modules from both products can be used in the same Kofax Capture queue.

Kofax Transformation Modules - Server converts document classification results and fields extracted using INDICIUS Recognition into data that is compatible with Kofax Transformation Modules.

Note Conversion from INDICIUS to Kofax Transformation Modules works only when Kofax Transformation Modules - Server is placed immediately after the default instance of INDICIUS Recognition in a Kofax Capture queue.

Classification

Every document type in INDICIUS requires a corresponding class to be defined in a Kofax Transformation project.

If a document enters Server with an INDICIUS document type that does not have a corresponding Kofax Transformation Modules class, Server runs its own classification, and no INDICIUS data is converted.

Note The INDICIUS document type is stored as a custom storage string named `Neurascript.Global.DocumentType`. If this custom storage string is not defined, the document type is stored in the `FORMNAME` node.

Extraction

For the conversion to take effect, every field of a [supported type](#) (except [full page](#) fields) in INDICIUS requires a corresponding field to be defined in a Kofax Transformation project.

If a document enters Server with an INDICIUS document type that matches a Kofax Transformation Modules class, and INDICIUS fields are defined that match Kofax Transformation Modules fields, the classification result is accepted, and all INDICIUS field data is transferred to the Kofax Transformation Modules fields. No locators configured in Project Builder will run in Server, even for additional fields that exist in the Kofax Transformation project but not in INDICIUS.

If no INDICIUS fields are defined that match Kofax Transformation Modules fields, any Project Builder locators associated with these fields are run.

Full Page OCR

INDICIUS stores full page OCR data in a standard field, whereas Kofax Transformation Modules stores this data in a separate location to fields in the XDoc. Any INDICIUS fields named `Page1`, `Page2` etc. (numbered for each page) will be treated as full page OCR data and stored to the corresponding page in the XDoc. There is no need to create fields `Page1`, `Page2` etc. in your Kofax Transformation project.

Note In an INDICIUS configuration, full page fields must be named `Page1`, `Page2` etc. (this is the default naming scheme if you have used Transformation Studio to produce your configurations).

Supported Field Types

The following INDICIUS field types can be converted:

- Single-line fields
- Multi-line fields

In Kofax Transformation Modules, all the data from a multi-line field is displayed on a single line.

- Mark sense fields

- Mark grid fields

Mark sense fields contain @ symbols or have no value, so configure INDICIUS Recognition to produce a single “mark sense result” field, containing the value of the box that is checked on the document. Mark grid fields should also be formatted to produce the result(s) of the grid as text fields.

Note In general, you should format all fields in INDICIUS so the data will have meaningful values when displayed in Kofax Transformation Modules. Formatting must be done at the time of extraction, and no additional data manipulation can take place during the conversion process.

INDICIUS table fields cannot be converted.

Summary

For documents entering Server with the following qualities, the following processes will take place.

Table 1.1. Inputs and Server processes

Input	Server Process
INDICIUS document type does not match a Kofax Transformation Modules class	Classification using Kofax Transformation project Extraction using Kofax Transformation project
INDICIUS document type matches Kofax Transformation Modules class Kofax Transformation Modules fields defined for that class do not match any INDICIUS fields	Conversion of INDICIUS classification result Extraction using Kofax Transformation project
INDICIUS document type matches a Kofax Transformation Modules class Kofax Transformation Modules fields defined for that class match some or all INDICIUS fields	Conversion of INDICIUS classification result Conversion of all INDICIUS fields that match Kofax Transformation Modules fields

Additional Information

Related Documentation

These release notes are a supplement to the following documentation:

Installation Guide for Kofax Transformation Modules

The installation guide provides instructions for installing Kofax Transformation Modules. In addition, it contains information about implementing your installation, certified operating systems, and other system requirements.

Kofax Transformation Modules Configuration Guide

The *Kofax Transformation Modules Configuration Guide* contains information about the configuration modules and how to use them, as well as detailed information about the technology provided by Kofax Transformation Modules.

Kofax Transformation Modules User's Guide

The *Kofax Transformation Modules User's Guide* provides information to the users of the interactive modules during production.

The guide explains:

- The purpose of each module
- How to use each module

Help

Kofax Transformation Modules Help is available from the application components 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.

Scripting Help

Information about scripting is available from the Help menu of any Project Builder interface that allows you to write or access scripts. Select Help and then the desired help component.

Technical Support

For additional technical information about Kofax products, visit the Kofax Web site at www.kofax.com and select an appropriate option from the Support menu. The Kofax Support pages provide product-specific information, such as current revision levels, the latest drivers and software patches, online documentation and user manuals, updates to product release notes (if any), technical tips, and an extensive searchable knowledgebase.

The Kofax Web site also contains information that describes support options for Kofax products. Please review the site for details about the available support options.

If you need to contact Kofax Technical Support, please have the following information available:

- Kofax Transformation Modules software version
- Kofax Capture and KCN Server software versions
- Operating system and service pack version
- Network and client configuration
- Copies of your error log files
- Scanner make and model
- Scanner engine (board) type
- Special/custom configuration or integration information

Training

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