

Kofax TotalAgility 7.2.0

Release Notes



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Contents

- About This Release 5
 - Version Information 5
 - Content Changes 5
 - New Features 5
 - TotalAgility 6
 - Thin Client 18
 - Devices Support 18
 - Changes in Behavior 19
 - WingScan Plug-in Replacement 19
- Resolved Issues 21
 - Issue Resolved in Kofax TotalAgility 7.2.0 R2 21
 - Unable to Upgrade to Kofax TotalAgility 7.2.0 from Kofax TotalAgility 7.0.2 21
 - Issues Resolved in Kofax TotalAgility 7.2.0 21
 - TotalAgility 21
 - Transformation Designer 22
 - Device Support 22
- Known Issues 25
 - TotalAgility 25
 - Create Advanced Settings Option Unavailable 25
 - Additional Manual Steps for the Dynamics AX Installation 25
 - Documentation Not Available for Installing TotalAgility on a Non-Standard Port 25
 - Limitations to Using Large Data 25
 - The Enter Job ID Field Truncated After Upgrade 26
 - System IO Error on Import or Export of a Process 26
 - Passwords Change After Importing Resources 26
 - Thin Client 26
 - Epson GT-S80 TWAIN- Scanner Communication Error 26
 - VRS TWAIN Scan Source Unavailable 26
 - Large PDF Upload Causes Error 27
 - Cannot Import Some GIF Files 27
 - Table Cells Hidden from View 27
 - Error When Trying to Reserve Scanners 27
 - Two Sheets Scanned When Using Scan One Sheet 27
 - Document Separation Settings Not Retained 27
 - Choice List Prompt Text Saved as Choice Value 27
 - Canon DR-9080C: Duplex Scanning Displays Single Thumbnails 27

Transformation Designer 28

 Unable to Complete Extraction Activity 28

Device Support 28

 Localized Text Does Not Appear on HP28

 Email Activity Fails for Color Multi-Page Documents 28

 Cannot Send Jobs from Konica Minolta after Upgrade 28

 Error When HP MFP Attempts to Connect to an On-Premise Multi-Tenant Server 29

 Localization30

 Fujitsu Server Fails to Update the Port Number 30

 Konica Minolta: Modifying Index Fields in Device Form Has No Impact on MFP30

 Images, Index Fields Missing from Workspace If Job Permissions Change 30

 Lexmark Displays Two Error Messages for Failed Logon Attempt30

 HP MFPs Allow Scanning Despite Field Validation Errors 30

 Xerox Field Validation Runs Only for Visible Fields 31

 'Previous' Button Sometimes Unavailable on HP MFPs 31

 Xerox Phaser 3635 Does Not Send Documents over HTTPS 31

 MFP Client Not Fully Compatible with Regular Expression Validation 31

 Connecting Screen Flashes on Ricoh Aficio MP C250032

 Ricoh C300 Does Not Support No Original Error Detection 32

 Fujitsu Single Sign On Does Not Pass Domain Name32

 Documents Lost Because of Encryption Error on Some Konica Minolta Models 32

 Some Fujitsu MFPs Unable to Scan at 400 DPI Using As Scanned Setting32

 Browser Lags When Associating a Large Number of Devices 32

 Cannot Exit Scan History on Konica Minolta C35 MFPs 33

 Automatic Logout Occurs on Ricoh 7.x Devices with CAC Authentication33

 Cannot Send a Large Job from HP MFP 33

 Konica Minolta Does Not Allow User to Enter Unlisted Value 33

 Long Dynamic List Items Unreadable on Lexmark X54833

 Overcropping with Ricoh Aficio MP C2500 33

About This Release

The release notes give you late-breaking information about Kofax TotalAgility 7.2.0 R2. Please read this document carefully, as it contains information not included in other TotalAgility documentation.

Kofax TotalAgility 7.2.0 R2 includes two modified components. If you are directly upgrading Kofax TotalAgility 7.0.2 to 7.2.0, you must install the revised version as it is a prerequisite for any subsequent fix pack or service pack. Installing the revised version is not required for a fresh installation of Kofax TotalAgility 7.2.0 or when upgrading from version 7.1.0 to 7.2.0.

Version Information

The build number for Kofax TotalAgility 7.2.0 R2 is 7.2.0.0.3658.

To verify the build number:

- 1 Use TotalAgility Designer to select **System Settings**.
- 2 Under Manage, click **Settings**.
- 3 On the General tab, in the Product Version field, locate the last 4 digits, which correspond to the build number.

Content Changes

This section lists changes made to the Kofax TotalAgility 7.2.0 release notes document since it was initially published.

Revision	Date of Change	Description
Kofax TotalAgility 7.2.0 R2	Aug 11, 2015	Added the following item to the Resolved Issues chapter. 628032

New Features

This section describes the features and enhancements included in TotalAgility 7.2.0.

TotalAgility

API Documentation

The SDK documentation, accessible through Help for TotalAgility (from the Designer), is available in a new format that includes the following:

- The details of the currently supported APIs (latest) and all APIs. Also states if a method has been deprecated.
- A more concise format of the list of supported methods for each service.
- All inputs and outputs are documented including the required fields, field types, and enumerations.
- Any special information pertaining to the method.
- Some coding examples and concept details.

Tenant Management System Enhancements

Monitor Tenant Database Limits

You can configure a limit so that you are notified once the amount of the available free space for the entire database size (all schemas) reaches the defined limit so that you can remove unwanted items. There is a maximum database size per tenant beyond which the system stops functioning. The following two settings are available for Azure:

- Available Space Notification Limit: Specify the amount of available free space for the database, and a corresponding business process to create once the amount of available free space in the database is less than or equal to the specified limit. For example, if your database is 150 GB and the available space notification limit is set to 20 GB, the process could send an email to the concerned person when the database is greater than or equal to 130 GB.
- Document Storage Notification Limit: Specify a threshold value for the document storage and a corresponding business process to create once the amount of available free space in Azure storage reaches the specified limit.

TotalAgility Enhancements

Integration/System Updates

You can install and integrate TotalAgility with SQL Server 2014.

TotalAgility supports integration with:

- Dynamics CRM 2013
- HP Records Manager 8.0 (latest version of HP TRIM)

TotalAgility User Credentials

During the installation process, you can enter credentials for the TotalAgility user. This user is then added to Administrator, Designer and Device Users group on installation.

Generate System Session ID on Installation and Tenant Creation

A unique system session ID is generated for each system installed or each tenant created as opposed to using a global system session ID.

- When you install TotalAgility on-premise, a new system session ID is generated.

- When you create a new tenant (on Azure or On-Premise Multi-Tenancy), a system session ID is generated for that tenant.

You can also set the value (GUID) of the System Session ID. For example, this value may be useful if you wish to retain a session ID when moving into production from a development environment.

Mobile and Tablet Form Features

Primary Form

In TotalAgility 7.1.0, every time you opened a form it defaulted to the desktop form even if you did not have a desktop form. You can now set the primary form so that each time you open a form in the Designer, the form factor that is set as the primary form is displayed.

Secondly, at the time of configuring redirect and menu items, when you consume a form, the initialization parameters for the primary form are displayed.

At runtime, if you browse to a form on a device and a form for that device does not exist, the primary form is shown. For example, if you create a tablet form, set it as primary and then browse the form on a mobile device, the tablet form will be displayed.

Desktop/Mobile/Tablet Themes

The out-of-the-box themes provided by TotalAgility include new styles applicable to desktop, mobile and tablet forms.

- Mobile - Oceana
- Mobile - Irn Blu
- Mobile - Rusty Moon

Site Settings

In addition to site settings for desktop forms, site settings are now available separately for mobile and tablet. These settings allow you to specify different themes, menus, and header forms for mobile and tablet.

You can also copy settings between mobile/desktop/tablet to reuse them.

List Control: Full Properties on Swipe Buttons

You can add confirmation messages and images, set validation and other properties on the swipe buttons on a List control to have full control over the button display and interaction.

If you import a form that has a List control created before TotalAgility 7.2.0, the two swipe buttons are automatically added to the grid retaining the settings configured for them. Any saved actions are also retained and added to tap events for the buttons. You can modify these buttons to include the advanced properties.

Action Menu: Confirmation Message

Use a confirmation message on buttons within the action menu so that users can confirm whether they wish to proceed.

Page Size Information

The page size information is available from the server when receiving the scan profile from TotalAgility. A new property called the Axis Threshold in a Mobile Capture control helps a mobile application developer to do the following:

- Accurately calculate DPI.
- Set the aspect ratio of the frame used in the user interface.
- Set the threshold in both the X and Y axis to maximize the viewable area before the image is taken.
- Set Relative Size for the area of a view that must be filled by a page before it is determined that a page is detected.

Relative Height

Set the height of a control as a percentage of the available form height. When you design a form in percentage mode, additional options to use Viewport height and set the percentage are available. This property prevents controls from scrolling off the bottom of the page. It is particularly useful for the Mobile Capture and Mobile Barcode Capture controls when you need to take a picture.

The percentage height is available on all controls except Case Health, Dropdown, Language Selector and Resource Selector.

Job and Activity Action Buttons and Action Pages

Two controls, Activity Action and Job Action, allow you to quickly perform a set of actions on a job or activity. The actions to display can be configured at design time.

Two out-of-the-box forms, Generic Job Action and Generic Activity Action, show basic properties of a job or activity along with the corresponding action button. These forms can be used to take action on a job or activity that has shown up within a report in Kofax Analytics for TotalAgility. You can also use these forms in your own solution and modify them as needed.

Enhancements to Form Controls

File Upload

The File Upload control has a new property, Restricted File Types, to restrict file types from being selected at runtime.

Text Box: String

Apply masks to text box controls and control the format of the data accepted by users. Text box of type String have an additional property to allow you to specify an input mask.

When several people have to enter data, masking a field helps maintain consistency and prevents users from entering invalid data. For example, phone number with optional extension: (000) 000-0000 EXT 999

Setting the value at design time will display the value with the mask applied at runtime.

Design Time

Field Type	String
Mask	(000) 000-0000 EXT 999

Runtime

Phone Number	() - EXT
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Text Box: Currency

Associate a currency with a currency text box to ensure the mask for data entry corresponds to the browser locale.

Text box of type Currency has an additional property that allows you to associate a default currency for formatting the value entered at runtime.

You can define currencies in system settings and then associate a currency with a currency field in a form.

When several people have to enter data in a multi-lingual system, using currency codes can ensure users see and input the value in a format familiar to them. For example, the decimal symbol in France is a comma, whereas it is a period (or full stop) in Ireland.

Image

You can produce a smaller image file than before using the same JPEG compression level settings. Secondly, when an image is stored to the TotalAgility database, the re-compression does not blow up the image size.

Resource Tree

Use the Resource Tree control within the Query Editor to select resources that may differ, depending on the current user. For example, the queries, “Show Jobs Created by My Supervisor” and “Show Pending Activities for My Direct Subordinates” would display different results depending on the logged-in user.

The following options are available in a query editor (in Job List and Work Queue):

- Me
- Me + My Groups
- My Direct Subordinates
- Me + My Direct Subordinates
- My Indirect Subordinates
- Me + My Indirect Subordinates

Summary

A new property, ResourceID, is available to show information for another resource (worker resource only). This property helps in monitoring the workload of others.

Create New Associated Job

The Create New Associated Job control is available in the Advanced toolbox. This control helps you provide a list of processes relevant to the current job (fragments and associated processes) that can be invoked to initiate an associated job.

If Allow Business process creation is enabled, a toggle option is also available to switch between case fragments and processes.

Web Capture

The Web Capture control includes the following options:

- Delete pages that have been incorrectly scanned.
- Reorder pages without clearing out of the activity to reimport.
- Upload PDFs.
- Prevent users from editing (move, resize, delete, change text) annotation, especially image redactions. An additional option for “Allow Edit” for each of the annotation types is added to the Web Capture control to configure editable annotation.

You can still use a Google Chrome browser to perform scanning even after Google Chrome has dropped support for NPAPI based plugins.

The latest version of the Atalasoftware control is used in the Web Capture control. This is the same version (10.5.x) that is used by the Thin Client.

The Web Capture control is updated to use EVRS version 2.2.

Work Queue and Job List

Work Queue and Job List form controls have query capabilities. The following two options are new to these controls:

Allow Query Selection to hide or display the Query panel at runtime.

Allow Query Edit to let users create, edit and share queries at runtime.

The Resource ID option in Work Queue control helps to identify and monitor pending activities of another worker resource, group or role.

You can set search properties of the Work Queue and Job List controls dynamically so they can be updated based on user interactions or other data on a form.

Mobile Capture

In a Mobile Capture control, you can define the area to capture an image by setting the axis threshold between 1% and 100% (Default: 75%). When you capture an image from a mobile application that is using this Mobile Capture control, the image is captured within the defined axis threshold.

The data such as paper size, orientation, deskew and others are now available from the scan profile assigned to the Mobile Capture control. This helps a mobile application developer adjust the user interface and perform image processing.

Delete Row Action

Delete a row from a table in a form using the Delete Row action.

For example, to delete details from a table whenever a leave is cancelled, add the Delete Row action to the Cancel Leave button on the form. Once the row is selected, and the Cancel Leave button is clicked, the row is deleted from the table.

User Personas and Landing Pages

A forms solution has many types of users who may perform tasks, solve problems and search for information.

Personas help you divide your target audience into individual groups of people to cater to different interests and needs. Each persona includes target landing pages and content to go with them. Landing pages are forms used by workers to perform certain activities.

TotalAgility provides the following default target landing pages (forms):

- Case Worker
- Task Worker
- Administrator
- Supervisor

You can view these forms on a desktop, and mobile and tablet devices, and can customize them.

Two new options are added to the Resource module to manage Personas and update all group members to have the same persona.

Users can also update their persona using the Profile page in Workspace.

Job List and Work Queue Queries

Create job and work queue queries to search for required jobs and activities.

You can also manage the display of the columns in the Results table at runtime by selecting columns and sorting them in the order of appearance. You can share queries with specific users or groups and retain queries for future use. The Queries panel lets you view the list of private and shared queries.

Some common queries are provided for both jobs and activities. However, you can create custom queries, set a default query, share queries ensuring team alignment, and display the queries list in a tree control. You can still use the Build WorkQueue form to give a custom look and user experience.

Editable column names are available for translation.

Nullable Capture Fields

You can set certain fields in a form to be nullable. When you use nullable type fields, at runtime the extraction is successful with the text box, date and drop-down fields appearing empty and the check box appearing clear.

Split Documents

You can split document to move a variable number of pages from an existing document into a new document. When documents are scanned using duplex mode, TotalAgility tries to keep the front and back image of a single paper together. A new capture action called Split on Back Page is now added. If you have the permission to split a document, you can also separate the

back page of a duplex page pair and place it in a new document. Once split, both the front and back page of a duplex page pair appear as a normal simplex page.

Resource Groups

Two new resource groups called Designers and Device Users are now added to TotalAgility groups. The members of the Designer group have access to TotalAgility Designer and Transformation Designer. The members of the Device Users group have access to MFP devices. The installation user is automatically added to these groups.

Retention Policy

The Retention Policy feature helps you to manage database cost (Azure), performance, size and maintainability.

On the Settings page of the System Settings, a new tab is added for Retention Policy where you can configure the number of versions to retain and the retention period for processes. You can also configure the retention policy for jobs, forms, documents and others.

You can configure the retention policy for a specific process on the Advanced tab of process properties to either retain the process permanently or for a specific period. For example, expenses may need to be retained for one year while more critical processes such as loan applications may need to be retained for seven years.

A new system task, Retention Policy, marks items for deletion if the retention period and number of versions exceed the defined limit. This task, which removes items marked for deletion, runs weekly by default.

An administrator can view the retention policy failures (if any) that occur when the retention policy system task runs. The Retention Policy Failures form displays the failures with the details such as date, item type, ID, name and version, and reason for failure.

Delete Documents and Delete Pages Action

The Delete Documents and Pages capture action is split into two actions: Delete Documents and Delete Pages so you can configure separate access rights for each.

Reject a Document with Rejection Reason Using the TotalAgility SDK

You can reject a document providing the rejection reason using the RejectDocument method in the TotalAgility SDK.

Configurable Hotkeys

You can modify hotkey mapping for a command. An option to manage configurable keys is added to the System Settings module.

You can define single sequence hotkeys (the “Modifier + Key” style hotkey) and double sequence hotkeys (the “Ctrl then key” style hotkey).

Security and Authentication Features

TotalAgility includes new features relating to passwords, account lockout and multi-factor authentication (MFA) which are important for all customer-facing applications that deal with confidential information.

Passwords

The following new password related features are added to give end users and administrators more control over passwords:

- Password Format
- Change Password
- Change Password on Next Logon
- Reset Forgotten Password

Password Format

Use the Password Format property in System Settings> Settings to specify the format (as a regular expression) that all passwords must adhere to.

When you create a user (internal and external) via the user interface (Designer or Workspace) or via an API and provide a password, the specified password must match the required format.

Change Password

The Change Password option is added to the Profile page in Workspace.

A new API called UserService.ChangePassword is added to SDK. This API is used to change the password of the current logged-in resource identified by the session ID.

If the current resource does not have a password, then you can leave the old password blank and give the resource a new password.

Change Password on Next Logon

The Change Password on Next Logon property allows administrators to force users to change their password on the next logon. You can set this property for all resources (System Settings>Account Settings) or at the individual resource (internal and external) level (Resource Configuration > Account Settings). This property can also be set when creating or editing resource via the API.

When users log on, they are redirected to the Change Password form.

Reset Password

The Logon form includes a Forgot Password link that can be used to reset the password.

TotalAgility provides a new Reset Password Notification Process option in System Settings>Settings>Account Settings that includes an out-of-the-box System map called SYSTEM Reset Password. On clicking the Forgot Password link on the Logon form, this map is initiated and an email is sent to user (at the email address provided by the user) with a link to reset password. When user clicks that link, the Reset Password form (provided out of the box) opens where they can provide the new password.

Account Lockout

This new feature added under System Settings>Settings controls how and when accounts are locked out.

You can set the number of invalid logon attempts that are allowed before an account is locked out. If the lockout threshold is set to zero, accounts will not be locked out due to invalid logon attempts.

You can also set the account lockout duration that determines the number of minutes an account remains locked before automatically getting unlocked. If you set the account lockout duration to 0, the account will remain locked until an administrator explicitly unlocks it.

The account can be unlocked by logging in again with the correct password after the account lockout duration has passed. An administrator can also lock and unlock accounts by updating configuration of internal and external resources in Workspace or Designer or setting the value using APIs when creating or editing a resource.

Multi-Factor Authentication (MFA)

Multifactor authentication (MFA) is a security approach that requires more than one form of authentication to verify the legitimacy of a user.

- A knowledge factor (“something only the user knows”) such as a password
- A possession factor (“something only the user has”) such as an email with a passcode
- An inherence factor (“something only the user is”) such as a fingerprint

TotalAgility supports the knowledge factor and possession factor to authenticate the user.

MFA aims to create a layered defense and make it more difficult for an unauthorized person to access the system. If one factor is compromised or broken, the attacker still has at least one more barrier to breach before successfully gaining access.

In TotalAgility, you can enable MFA under System Settings>Settings>Account Settings, and configure how long the passcode and cookie remain active. You can also configure the process to send a passcode to the user. A notification process called SYSTEM Passcode Notification is provided by default.

You can enable MFA independently for internal and external resources. When MFA is enabled, users logging on for the first time are requested to enter a passcode, and on entering an active passcode a cookie is added to users system and logon proceeds. On subsequent logons, System checks for a valid cookie, and if none exists, user has to go through passcode verification again.

Session States

In previous releases , a resource was either logged in or not. As new security updates, TotalAgility provides additional states:

- Awaiting change password (when users have been set to “Change password on next logon”)
- Awaiting change forgotten password (when user requests to reset the password)
- Awaiting passcode (when user is in the process of multi-factor authentication)
- Logged on (the user has successfully logged on)

You can configure the forms associated with each state in System Settings>Settings>Account Settings. The logon APIs return the associated state and form to allow user to be redirected to the next step.

General Security Enhancements

Phone Number

A Phone Number (String) property added to external and internal resources can be optionally set using resource configuration, or retrieved using APIs.

Designer Access Permissions

A new permission is used to control the resources that have access to log on to Designer. The logon is only successful if the resource has permission to access the Designer.

MFP Device Permission and Protocol

A new permission is used to control the resources that have access to log on to MFP devices.

A new logon protocol is added for MFP (10). Using MFP protocol, logon is only successful if the resource logging on has access permission to Devices.

Packages

In TotalAgility 7.2.0, you can create package and export items for reuse in different instances of TotalAgility. You can also add queries and other items to a package, import packages, and compare packages. This helps you make informed decisions on the items to import or upgrade.

Federated Security

TotalAgility uses federated security or claim-based identity for authentication, the process used to verify the identity of the users and system processes.

Federated security is an arrangement for managing identities and access to resources that span companies or security domains. It avoids identity duplication and security administration at multiple locations.

TotalAgility uses Web Services Federation Language (WS-Federation) and Security Assertion Markup Language (SAML) protocols that allow users that have already logged onto one site to access another site without logging on again. Single sign-on (SSO) is a subset of federated security in which a user's single authentication ticket or a claim token is verified across multiple IT systems or organizations.

Claims tokens contain multiple statements the authenticated user or organization makes about itself or another subject. For example, a statement can refer to a name, group, buying preference, ethnicity, privilege, association or capability. Claim tokens are signed to verify they have been issued by the correct Identity Provider.

SignDoc Integration

SignDoc provides solutions for digital capture, management and verification of signatures that helps accelerate business processes, eliminate errors and protect documents against manipulation.

Integrating TotalAgility with SignDoc simplifies information-intensive customer interactions with fully digital, streamlined and secure experience.

A new activity, SignDoc is used to define a process to get the documents digitally signed.

Enhanced Export Activity

A new property, Documents Exported, is added to the current Export activity to access the documents that are successfully exported (document ID) as well as the current unsuccessful list.

The Documents Not Exported property has been extended to identify documents that have no document type mapped.

Disable VB Script on Azure and On-Premise Multi-Tenancy

When you launch the Process Designer on Azure or a tenant in an on-premise multi-tenancy environment, the VB Script activity type is not available.

If you import a previous version of a process that contains a VB Script activity, the node becomes read-only and execution of the activity fails unless the node was defined in the on-premise proxy (in which case the Execute Remotely property is set).

Process Notes

A Notes option in the modeling bar of Process Designer is used to record process notes against a process. A process note is essentially a design note that allows user to suggest some redesign to improve or report issues with a process.

You can view new notes and record updates. The system audits who added the notes, and when was the note added. When a process is exported or imported between systems, the notes are included.

Safe Scripting

TotalAgility prevents malicious scripts and code from being executed in a multi-tenant environment.

If you execute a .NET/C#/VB.NET activity that contains malicious script or script that tries to access the file system, the activity fails and the job suspends. Similarly, a .NET form action fails and returns an error if a malicious script is found.

If any of the nodes are within a synchronous process, the process will not complete.

Associate Create New Job Form with a Process

A new property, Associated Form, lets you associate a Create New Job form with a process.

Using this property you can ensure the user is provided with the correct form to create the job. This form could be the one designed within TotalAgility or an external form. This form is used to provide initialization values and if none is specified, the control uses the generic Create New Job form.

This property has been integrated in the following features in TotalAgility:

- Job Actions button: When you create a job, if the underlying process has an associated form, that forms is displayed.
- Case properties: When you create an associated job (fragment or process), the Associated Job control is displayed. On selection of a process/fragment, if the underlying process has an associated form, that form is displayed.

Translate Processes

You can translate the following process items: Process Name, Process Description, Category Name, Activity Name, Activity Description, Milestones, States, Roles and Work Types. A new manage Translations option is available within the Process Designer module.

A new system setting, Allow Multilingual, lets you open the form in the correct locale when the browser is set to a different language.

You can set the browser locale either from the browser setting or from the Language Selector control. When upgrading from a previous version, this property is turned off.

Document Set

A document set is a group of related documents that can be managed either individually or as a single entity. This new feature helps you define the content type, whether it is optional or required, and the workflow to describe what to do when you receive a document of a specific type.

Use a new option on the modeling bar of Process Designer to configure the requirements for each content type.

You can also configure exceptions for a document set so that actions can be taken when the required documents are not received.

Within processes, you can define conditions based on the document set or one of its content types. For example, you cannot send the application for approval until all document requirements are met.

Use the following nodes on the Common group to define the Document Set functionality:

- Document Received: Adds a document to the document set.
- Document State: Updates the state of a document so that you can easily see what processing has been performed. Only resources with Update Document Set functional access are permitted to update the runtime status of the content type.
- Add Document Type: Adds a content type requirement to the document set.
- Evaluate Document Set: Evaluates the rules for the document set and any preconditions; the activity does not become pending until the precondition is met. Evaluating the document set rules through the node or control reevaluates the preconditions.

Use the Document Set control to add the Document Upload action to a form to upload a document.

An option to view the document set appears on the Job Properties page in Workspace. This option displays the summary of documents required for completing the process. Additionally, you can upload the outstanding documents to the document set.

Improved Display of a Job or Process in the Viewer

The display of a job or process in the viewer includes the following improvements:

- Prevents links crossing other nodes.
- Shows the rounded lines for the links.
- Shows the bridges when one link crosses the other.
- Prevents the overlapping of the links.

Analytics Actions

You can perform actions on Analytics using the new TotalAgility menu option.

Thin Client

Improved Keyboard Navigation

Use the left and right arrow keys to navigate back and forth between pages when the selected document has focus in the navigator panel or the thumbnail panel. There is no need to first click on the thumbnail. Some users may prefer this approach rather than manually clicking the page in the thumbnail panel or using the Go to Thumbnails shortcut.

Rejection Notes in Status Bar

The Status Bar displays the page or document rejection note (if any).

Enhanced Document Rotation in Image Viewer

While viewing a page in the Image Viewer, it is possible to rotate a view clockwise or counterclockwise in 90 degree increments. When a view is rotated, the OCR results and the field data associated with the page are maintained, although the image is displayed without the OCR data. When the image is rotated back to its original orientation, the OCR data reappears and is selectable. You cannot permanently rotate a page while a view rotation has been applied. Return the view to the original orientation by clicking on the revert button, by using the view rotation buttons, or by navigating away from the page. The permanent rotation buttons are then enabled.

Drag Pages Between Documents

Document editing has been improved to allow greater flexibility. For example, you can drag pages between documents by selecting a page in the Thumbnail viewer and dragging it to the target document in the Navigator panel.

Devices Support

Support for Additional Browsers

The Devices screen supports additional Web browsers, including Chrome and Firefox running in Windows.

Improvement in Devices Support

Device support include the following improvements:

- Support for HP OXPd 1.6.
- Xerox MFPs can send data using an HTTP/HTTPS connection. An FTP server is no longer needed.
- Logs are generated for each connected device and stored on the server.

Changes in Behavior

This section describes changes to the product behavior since the previous release.

WingScan Plug-in Replacement

In previous releases, the NPAPI plug-in was used for Capture scan activity and web capture controls to enable scanning through a web browser.

As the NPAPI support has been deprecated in Chrome, the new Web Capture Service now replaces the NPAPI based plug-in.

You must install the Web Capture Service.

Installing the Web Capture Service

You must install the Web Capture Service only once, and web scanning is enabled across all supported browsers.

When installing through the browser, you must have administrative rights to complete the installation.

- 1 Open a scan-enabled form.

The first time, you are prompted to install a new Web Capture service.

- 2 Click **Run**.

- 3 Alternatively, select Save As to keep a copy of the msi installer.

The msi installer can be used for enterprise-wide deployment scenarios.

- 4 Refresh the page once installation completes.

The Scanner Selector icon becomes available after the page refresh.

The Kofax Web Capture Service icon in System Tray icons indicates if the service is running.

Resolved Issues

This chapter gives information about previously reported issues that are resolved in Kofax TotalAgility 7.2.0.

Issue Resolved in Kofax TotalAgility 7.2.0 R2

The following issue has been resolved in Kofax TotalAgility 7.2.0 R2.

Unable to Upgrade to Kofax TotalAgility 7.2.0 from Kofax TotalAgility 7.0.2

When upgrading to TotalAgility 7.2.0 from version 7.0.2, a network-related or instance-specific error occurred while establishing a connection to SQL server. (628032)

Issues Resolved in Kofax TotalAgility 7.2.0

TotalAgility

Cannot Use License Proxy Across All Tenants Between Two BPO Sites

TotalAgility 7.1.0 did not support shared licensing for on-premise, multi-tenant linked BPO sites across all tenants through the License Proxy. (345024)

An error was generated in the Windows log when you clicked the Test button in the Kofax TotalAgility License Proxy Configuration application if the TotalAgility URL field was set to a non-tenant based URL such as:

```
https://OPMTServerName.domain.com/TotalAgility/Services/Core/  
LicenseServerService.svc
```

XML Expression Variable Error

If you queried XML using an XML Expression variable, the following error occurred. (344741)

```
Namespace Manager or XsltContext needed.
```

Views in Navigation MainMenus Not Redirected at Runtime

In Kofax Analytics for TotalAgility, if you added a View to Navigations as a MainMenu item, the View was not redirected at runtime. (322625)

Unencrypted Password Caused HTTP Request Error

If “process password” was selected in the Kofax Import Connector advanced security settings for the Message Connector Configuration, an “HTTP request unauthorized client” error

was reported during file import. The Kofax Import Connector password encryption was not maintained when TotalAgility used the password. (314615)

Inline Style for Document Type Form Not Updated

In the Validation activity, the inline style “capturetextbox” was not updated for the document type form if the Mini Viewer property was enabled. (314308)

Merge Field Values Not Populated Unless Microsoft Word Language Is English

If English was not set as the default language in Microsoft Word, the merge field values mapped to a TotalAgility document were not populated. (307724)

Transformation Designer

Inconsistent RTTI Performance

RTTI performance has been improved by changing the image format used. (389795)

Memory Leak During Image Processing

A memory leak occurred when processing an image in A2iAZoneLocator with checkReader. (389770)

Classifying Selection Should Work the Same as Previous Version

Selecting “Classify Selection” in Text Mode in the Document Viewer highlighted the Matched Instructions of the Winning Class as it was in Kofax Transformation Modules 5.5. (372392)

Account for Relative A2iA Image Snippet Coordinates

When opening an old project for the first time after installing a Fix Pack that had one or more A2iA Zone Locators with dynamic fields defined, you had to open and close the A2iA Configuration tool for each A2iA Zone Locator to ensure that the marker details for the dynamic fields were loaded. This ensured that the dynamic fields were at the correct position from that point forward.

Note Once all A2iA Zone Locators were updated, the project was no longer backwards compatible.

As a result, the project could not be opened or processed by an earlier version of Transformation Designer. (354649)

Device Support

Jobs Not Sent from HP When HTTPS Was Disabled on IIS

If HTTPS was not enabled on IIS, HP MFPs with OXPd 1.6 could not send jobs to the Kofax TotalAgility server

The job status was shown as “Success,” but the job did not appear in the scan history, and it did not arrive at the Kofax TotalAgility server. This problem occurred even when the HP was

connected with HTTP. This problem did not occur when IIS had HTTPS enabled and on HP MFPs with OXPd 1.4. (558752)

No Error when Entering Spaces in a Required Field on Xerox

If a user entered spaces in a required field on a Xerox MFP, no error appeared, and the job could be scanned. (556847)

Kofax Client Exits on Xerox 3635

While scanning a large number of pages on a Xerox 3635, the Kofax client application exits. (553952)

This is the vendor behavior on this particular model, so it is as designed and cannot be changed.

Canon MFP Guide Missing Uninstallation Instructions

Uninstallation instructions were missing from the *Kofax TotalAgility Administrator's Guide for Canon MFP*. (517246)

Shortcuts Were Not Visible

When using a Fujitsu N1800 device with firmware version ss001 01.07.01.0003 S11-06, no shortcuts were displayed on the device. (451512)

OK Button Not Visible

On Ricoh 1107 MFPs, the OK button was not visible on the Scan History List. (372441)

Slow Transfer of Color and Grayscale Images from MFP

Slow speeds were reported when transferring color and grayscale images from an MFP to the Kofax TotalAgility server. (354015, 310914)

Konica Minolta Devices Required Support for Single Sign-On

Konica Minolta devices did not support single sign-on without the need of third-party software. (327885)

User on Two Domains Prevented MFP Logon

If two domains were used in a two-way-trust relationship, an "Invalid User" error occurred when a user on both domains attempted to log on to an MFP. (316058)

Cancelled MFP Jobs Appear in the Kofax TotalAgility Work Queue

Cancelled MFP jobs from HP MFPs appeared in the Kofax TotalAgility work queue. Although no images existed, the index field values were retained. (298318)

Error Prevented Job Submission on MFP Emulator

Jobs could not be submitted on the MFP emulator because of an invalid validation error. (284205)

Fujitsu Secure Scan Client Locked Up

Removing the CAC card from the reader while the device was scanning caused the client application to lock up and require a restart. (34415)

Shortcut Names Blank on HP and Xerox MFPs

On HP and Xerox MFPs, shortcut names appeared blank on the screen, but they could be selected to display the setup window. Only Log On and Scan History appeared on the main window. (23445)

Restricted Access to Client Settings for Canon MFPs

Users who are not administrators were able to change the settings of shortcuts. (15192)

English Text Appeared When HP MFPs Set to Portuguese

If the display language of an HP MFP was set to Portuguese or Brazilian Portuguese, English text sometimes appeared in the user interface. (12194)

Jobs Not Picked Up from FTP Folder when Sent from Xerox Phaser 3635

Jobs sent from a Xerox Phaser 3635 MFP were not picked up from the FTP folder by Kofax TotalAgility because the extension of the metadata file, .xst, was lowercase instead of uppercase. (11937)

Known Issues

This chapter describes issues that you may encounter while using Kofax TotalAgility 7.2.0. Workarounds are provided, as applicable.

TotalAgility

Create Advanced Settings Option Unavailable

In Devices, the Create option that was on the Settings - Advanced tab is not available in version 7.2.0, even though it was available in version 7.1 and documented in the help. (614258)

Additional Manual Steps for the Dynamics AX Installation

You must perform the following manual steps to successfully add a Dynamics AX 2012 R2 site in TotalAgility:

- 1 Copy version 6.2 of **Microsoft.Dynamics.BusinessConnectorNet.dll** from the Dynamics AX server to the bin directory of the DAXCommunicatorService that you install on to the Dynamics AX server.
- 2 Copy the **Web.config** file from the folder Dax2012R2 available under Agility.Server.Integration.DynamicsAx.Web and paste it under Agility.Server.Integration.DynamicsAx.Web. This **Web.config** tells the service to use the 6.2 version of the dll.

Dynamics AX 2012 R3 is not currently supported with TotalAgility 7.2.0. (611243)

Documentation Not Available for Installing TotalAgility on a Non-Standard Port

Documentation is not available for installing TotalAgility on a non-standard port during installation and also if port is changed after installation. (612881)

Limitations to Using Large Data

Currently, you can import and export data up to 30 MB using Internet Explorer 9. If you are importing projects greater than 30 MB, you should use Internet Explorer 10 and later; a new browser window opens to improve performance.

In on-premise, a data can be up to 3 GB in size (using Internet Explorer 10 and later), however, any capture project must be less than 2 GB.

In the cloud, a data of up to 60MB can be imported and exported (using Internet Explorer 10 and later) using SQL Azure. (608137)

The Enter Job ID Field Truncated After Upgrade

The “Enter Job ID” field in Find Jobs page is truncated after upgrade. (595281)

Workaround: Manually import the style sheet or make the change to the customized style within the style sheet in use. However, any custom changes to the style sheet will be overwritten.

System IO Error on Import or Export of a Process

If you try to import or export a process simultaneously in an on-premise web and application environments, the System IO exception is thrown. (589887)

Passwords Change After Importing Resources

When you import a map from an older version into Kofax TotalAgility 7.2.0 and the hashing algorithm is set to Scrypt, the resources with passwords fail to log on to TotalAgility as the passwords can no longer be decrypted. (583834)

Workaround: To log on, the password for each resource must be reset by the Administrator.

Thin Client

Epson GT-S80 TWAIN- Scanner Communication Error

In Scan Create New Job, scanning is paused unexpectedly after the Epson GT-80 TWAIN is used to scan 200 or more images. This occurs when the TotalAgility Default profile is used to scan black and white duplex images at 200 dpi. After a few minutes, the scanner times out and displays a communication error. (562222)

If you click OK for the error, scanning stops and all images render in the Thin Client activity.

Workaround: Use Kofax VRS scanning.

VRS TWAIN Scan Source Unavailable

On a Thin Client workstation where Kofax VRS is installed, the following issues exist if you use Internet Explorer in Protected Mode to scan a TotalAgility form (345299):

- VRS TWAIN source is not available during scanner selection
- Browser fails upon exit

Workaround: Do one of the following:

- Turn off Enable Enhanced Protected Mode in Internet Explorer before scanning with a VRS TWAIN source.
- Use Mozilla Firefox or Google Chrome to scan with a VRS TWAIN source.
- Scan with a non-VRS TWAIN source.

Large PDF Upload Causes Error

While using Internet Explorer in an Azure-hosted environment, if you import a PDF file over 30 MB during the process of creating a scan job, an “unexpected internal error” occurs. (344699)

Workaround: Use Mozilla Firefox or Google Chrome instead of Internet Explorer, or reduce the size of the PDF file.

Cannot Import Some GIF Files

When you attempt to import some .gif files, no document is created. (301910)

Table Cells Hidden from View

When edit mode is off, table cells do not come into view as you tab from one cell to another. (310718)

Error When Trying to Reserve Scanners

A “Communication Failed” error occurs in Internet Explorer when you attempt to reserve some scanners. (310559)

Two Sheets Scanned When Using *Scan One Sheet*

Clicking *Scan One Sheet* scans two sheets instead of one. (302928)

Document Separation Settings Not Retained

If a scan client user selects Bar Code and Patch Code Separation from the Document Separation options, settings are not retained for subsequent scan sessions. This happens only if no default Separation Profile is configured for the process. If a default Separation Profile exists, changes to the Document Separation are retained successfully. (302732)

Choice List Prompt Text Saved as Choice Value

When you add a prompt to a choice list, the prompt text appears as the choice value. For example, the choice value result might be “Please select a value.” This problem occurs for both Restricted and Free choice lists. (297891)

Workaround: Either remove the prompt text from the lookup definition, or configure a validation rule to mark the field as invalid if the field contains the prompt value.

Canon DR-9080C: Duplex Scanning Displays Single Thumbnails

When you use the native TWAIN driver on the Canon DR-9080C for duplex scanning, thumbnails are displayed as single not duplex images. This issue does not apply to the VRS driver. (296671)

Transformation Designer

Unable to Complete Extraction Activity

During an attempt to execute an imported invoice process map, the extraction activity fails with the following error. (322899)

```
Execution of activity Extract_Sub_Process in job
811FC8AE1DEB49C8BE99AB2A3D342274 was aborted due to the following
error(s): Failed to process KTM task:
BeforeExtraction: BeforeExtract: The Locator assigned to field
"INVOICELINES" doesn't have the same table model as the
field. See Kofax Transformation Server log for details.
```

This error occurs if two non-related table fields are using the same table model, and one of the columns for the table fields has changed in TotalAgility, which requires different table models. As a result, one field now has the new table model, but its locator is still using the original table model. Table locators assigned to table fields must use the same table model as the table field.

Workaround: After the failure, reopen the project in Transformation Designer and do the following:

- 1 Go to the class with the INVOICELINES field, and remove the table locator assigned to that field.
- 2 Change the locator's table model to the updated table model.
The updated table model name is likely to be the name of the field that previously used that locator.
- 3 Reassign the locator to the field.

Device Support

Localized Text Does Not Appear on HP

When installing the client for HP with OXPd 1.6, localized text does not appear on the title screen. (614558)

Email Activity Fails for Color Multi-Page Documents

When using an email activity to process color multi-page documents from an MFP, the following exception is generated in the Windows log in Event Viewer:

```
An exception of type 'System.ServiceModel.FaultException`1
[[Agility.Server.Integration.Common.ErrorHandling.CustomExceptionDetail,
Agility.Server.Integration.Common, Version=1.0.0.0, Culture=neutral,
PublicKeyToken=d86c87abe4a71948]]' occurred and was caught.
```

This error does not occur when sending mostly black-and-white documents or when using the same process and images from the Thin Client. (613934)

Cannot Send Jobs from Konica Minolta after Upgrade

After upgrading to 7.2.0 from TotalAgility 7.1.0, jobs cannot be sent from Konica Minolta devices to the TotalAgility server. (613963)

Workaround: Modify the database to add the `imagetransfer.method` setting. This change should be made immediately after upgrading.

Add a row for the `imagetransfer.method` setting to the following databases and tables:

- On-premise installations: In the TotalAgility database, add the row to the `KFS_GLOBALSETTINGS` table.
- On-premise multi-tenant installations (all-in-one or distributed): In the `TotalAgility_<tenantname>` database for each tenant, add the row to both the `live.KFS_GLOBALSETTINGS` and `dev.KFS_GLOBALSETTINGS` tables.

The row for `imagetransfer.method` contains the following values:

Column	Value
NAME	<code>imagetransfer.method</code>
NAMESPACE	<code>mfp.konica_minolta.properties</code>
CATEGORY	Legacy
DESCRIPTION	
VALUE	<code>ftp</code>
ISMASKED	0

Note This workaround is not available for Azure configurations.

After making the modification, jobs are sent normally to the server. Any jobs that were created before the modification need to be redone.

Error When HP MFP Attempts to Connect to an On-Premise Multi-Tenant Server

Unrecognized transfer encoding message is displayed on HP MFP when trying to connect to an on-premise multi-tenant server. (613582)

Workaround 1: Do the following:

- 1 Turn off compression on the `BrowserDevice` folder in IIS, on the web server:
 - 1 Open IIS Manager.
 - 2 Navigate to the `TotalAgility\Kofax\BrowserDevice` folder.
 - 3 In Features View, double-click **Compression**.
 - 4 Clear the **Enable static content compression** option.
- 2 Restart IIS.

Workaround 2: Do the following:

- 1 Rename the HP and js folders (for example, `HP.old` and `js.old`) in the following location on the TotalAgility web server: `C:\Program Files\Kofax\TotalAgility\Agility.Server.Web\Kofax\BrowserDevice\Static\`.
- 2 Restart IIS (`iisreset`) on the web server.
- 3 Click the **Kofax** button on the MFP.

Localization

The front-panel software for MFPs, including all onscreen messages and help, have been translated into the following languages:

- Brazilian Portuguese
- French
- German
- Italian
- Spanish

The following information has not been translated and is only available in English.

- Text related to non-animated mode of the MFP Emulator. (553647)
- HTTP client setting on the Lexmark configuration page. (552444)

Fujitsu Server Fails to Update the Port Number

When changing the server settings for a secure or insecure connection for the Fujitsu, the port number does not update. For example, when changing from HTTP to HTTPS, the port number remains the same. (549834)

Konica Minolta: Modifying Index Fields in Device Form Has No Impact on MFP

On Konica Minolta devices, after you log on, you must select **Shortcuts** to see the available shortcuts; they do not automatically appear. (305243)

Images, Index Fields Missing from Workspace If Job Permissions Change

If a user enters values in MFP index fields, and later the TotalAgility Designer unassigns the user from the process, the index field values do not appear in the Take Activity window for the job. (302709)

Lexmark Displays Two Error Messages for Failed Logon Attempt

If a logon attempt fails because of an incorrect username or password, the Lexmark X656de displays two error messages (301787):

- error.server.general
- Invalid user...domain\username

HP MFPs Allow Scanning Despite Field Validation Errors

If you enable field validation and disable form validation, fields with invalid values do not prevent scanning as expected. If you enter an invalid value and press Previous to close the error message, you can still scan, despite the field validation error. (300307)

Workaround: Enable both field and form validation. Form validation can prevent scanning when field validation errors exist.

Xerox Field Validation Runs Only for Visible Fields

If a form has more than one page of fields, field validation is run only for the fields on the visible page. If an invalid value exists on another page, but all fields on the visible page have valid values, you can still scan the document. (298575)

Workaround: Make sure that both field and form validation are enabled. Form validation can prevent scanning when fields on other pages have invalid values.

'Previous' Button Sometimes Unavailable on HP MFPs

If a profile has only one global form and the Log On button is disabled, the Previous button that takes you to the Kofax Main Menu does not appear. As a result, you cannot cancel from a list of fields to view the scan history on the Kofax Main Menu. Instead, the device displays the HP Home button, which takes you to the main menu for the device. (297860)

Xerox Phaser 3635 Does Not Send Documents over HTTPS

If a Xerox Phaser 3635 MFP is configured to connect through HTTPS, documents scanned by the device do not arrive at the server. If you generate a Scan To File Confirmation Report from the MFP, it includes the following error in the [Job Status] section (296732):

Destination: Failed, Path: /.

Workaround: Edit the Registry to disable TLS 1.0:

- 1 In IIS, disable TLS 1.0.
- 2 Navigate to:


```
HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Control\SecurityProviders
\SCHANNEL\Protocols
```
- 3 Modify the key as follows:
 - a Create a subkey named **TLS 1.0**.
 - b Under TLS 1.0, create a subkey named **Server**.
 - c Under TLS 1.0\Server, create a DWORD value named **Enabled**, and then set the value to 0.
- 4 Restart the computer.

MFP Client Not Fully Compatible with Regular Expression Validation

The MFP Client is not fully compatible with regular expression validation. Although MFP client input is not case-sensitive, regular expressions are case-sensitive. A mismatch between cases can result in unexpected validation results (294837):

- Invalid data may be sent to the server if validation is not triggered correctly.
- Valid data may incorrectly trigger an error.

Workaround: Clear the field and reenter the regular expression in the correct case.

Connecting Screen Flashes on Ricoh Aficio MP C2500

If Kofax Ricoh MFP Client is the only extended feature on a Ricoh 2500 MFP, and one shortcut exists, a connecting screen will flash several times because the client software keeps reconnecting. (12853)

Ricoh C300 Does Not Support *No Original* Error Detection

If an original is not in the ADF or on the flatbed, the Ricoh C300 scans a blank page from the flatbed. A “missing original” error message does not appear because Ricoh C300 devices are unable to detect an original on the flatbed. (12141)

Fujitsu Single Sign On Does Not Pass Domain Name

The Fujitsu N1800 single sign on feature does not pass the domain name to the Kofax TotalAgility server. This may cause the wrong user account to be authenticated or authentication to fail.

If you have multiple domains in your network environment, such as parent/child domains, single sign on authentication may fail if you do not specify the domain when logging on to the Fujitsu device. (11813)

Workaround: Specify the full name including domain name when logging on to the Fujitsu device.

Documents Lost Because of Encryption Error on Some Konica Minolta Models

When using image transfer encryption on Konica Minolta bizhub models C353, C550, and 552, files may fail to appear in the work queue. The following error appears in the API log (11638):

```
ERROR [http-0.0.0.0-8443-1][helper.JobStatusRptHelper] Fail processing scanned file  
org.bouncycastle.crypto.InvalidCipherTextException: pad block corrupted.
```

Workaround: In the `mfp.konica_minolta.properties` namespace, set the `enable.image.encryption` property to 2 to disable it. Information on locating and modifying the file is in the *Kofax TotalAgility Administrator's Guide for Konica Minolta MFPs*.

Some Fujitsu MFPs Unable to Scan at 400 DPI Using *As Scanned* Setting

On some Fujitsu MFP models, the MFP does not scan at 400 dpi if the scan settings are set to “As Scanned” in the Scan/VRS Profile. (11327)

Browser Lags When Associating a Large Number of Devices

If you are associating a large number of devices (approximately 30,000) with profiles in the Devices screen, you may experience delays when selecting a device or scrolling through the list. (10804)

Cannot Exit Scan History on Konica Minolta C35 MFPs

After a series of steps on a Konica Minolta C35 MFP, it is possible to be in the Scan History window with no way to exit. This happens when you view the details of an entry in the Scan History window, press Close and then Cancel to leave the window, and then view Scan History again and press Cancel. The Scan History window remains in view without the Cancel button. (10792)

Automatic Logout Occurs on Ricoh 7.x Devices with CAC Authentication

On Ricoh devices, automatic logout should not occur during scanning. This works properly on Ricoh 4.x and 5.x devices. On Ricoh 7.x devices with CAC authentication, automatic logout still occurs during a scan. (10692)

Cannot Send a Large Job from HP MFP

When scanning a large job (around 50 pages) at a high resolution (400-600 dpi) on an HP MFP, the job fails to be sent to TotalAgility server and no error appears. This was reported on an HP CM3530 MFP. (10608)

Workaround: Break up the job into smaller groups with 15 or fewer pages.

Konica Minolta Does Not Allow User to Enter Unlisted Value

On a Konica Minolta MFP, the user is not allowed to enter a value that does not appear on a choice list. (10560)

Long Dynamic List Items Unreadable on Lexmark X548

If an item in a dynamic list has more than 32 characters, the text wraps within the field and makes it unreadable. This only affects the Lexmark X548. (9241)

Workaround: Make list items 32 or fewer characters.

Overcropping with Ricoh Aficio MP C2500

Ricoh Aficio MP C2500 MFPs have a problem with detecting small page and mixed page sizes when configured for automatic page detection. This can cause overcropping and a loss of data. (8892)

Workaround: Use documents that are the same size, ensure the largest page is scanned first, or overscan by changing the paper size from auto-detect to the size of the largest document in the scan job.

