

KOFAX
Capture
Advanced Reports
3.1

Release Notes



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Introduction

This document contains the release notes for Kofax Capture Advanced Reports 3.1. The release notes contain information not included in other documentation.

New Features

This release enables Kofax Capture Advanced Reports to be installed on and/or operated with the following:

- Kofax Capture 9, or Kofax Capture 8 with Service Pack 4 or later

Note This release is not supported for Ascent Capture 7.5 or earlier.

- Additional environments
 - Windows 7
 - Windows Server 2008
 - 64-bit systems

Changes in Behavior

The following features have changed in this release.

- Kofax Capture Advanced Reports Viewer for this release can now be installed and operated on a Kofax Capture server, or a terminal server or Citrix system. This feature is available because Kofax Capture Advanced Reports Viewer 3.1 (as well as Kofax Capture 9) now uses Crystal Reports 2008.

To install the Kofax Capture Advanced Reports Viewer, follow the instructions in the *Installing the Reports Viewer* section of the *Kofax Capture Advanced Reports Installation Guide*.

- An MSDE installation is no longer supported.

Resolved Problems

The following problems have been resolved in this release.

Database Name Can Be Changed

The default database name Statistics can be changed during or after setup of Kofax Capture Advanced Reports. If changed after setup, be sure to change the name for the Kofax Capture Advanced Reports connection settings (located in Kofax Capture Administration, on the Advanced Reports menu). (SPR00051829)

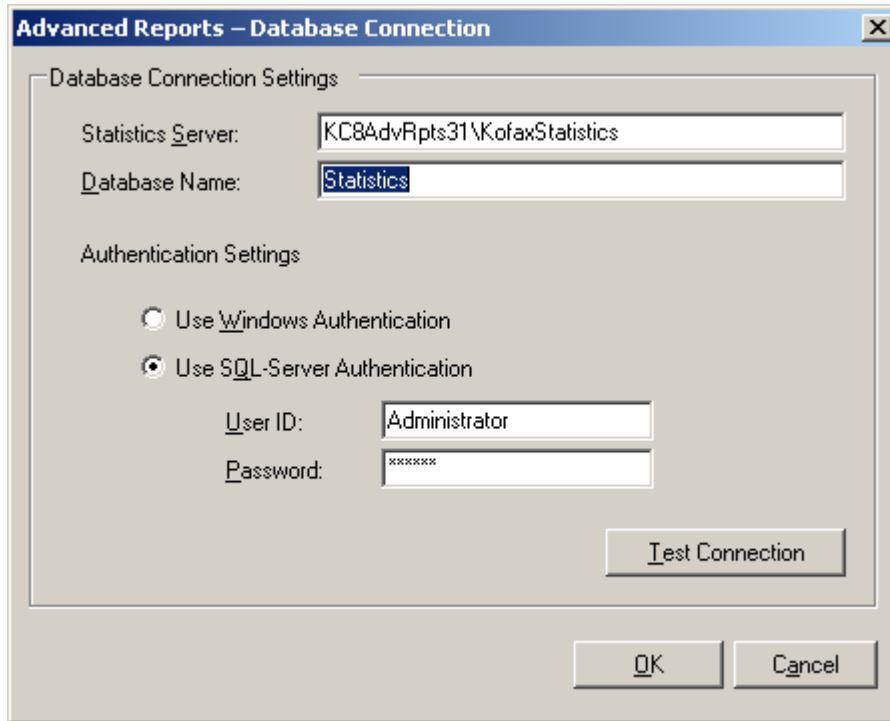


Figure 1. Database Name for Kofax Capture Advanced Reports Database Connection Settings

Data Export No Longer Fails

Data export no longer fails if there are multiple instances running on a single computer. (SPR00053547)

Batch Name No Longer Limited to 50 Characters

The batch name is no longer limited to 50 characters. This limitation previously had caused errors if the name exceeded the limit. The batch name now can contain up to 128 characters. (SPR00055452)

Known Problems

The following are known problems in this release.

Inaccurate Reporting for Incomplete Batch Processing

In some cases, operator productivity reports do not accurately reflect the number of documents processed during a session. For example, if a validation operator opens a batch with ten documents but validates only three of them, the productivity report will indicate that all ten documents were validated. The result is that the number of documents processed by the operator will be overstated and the average processing time per document for the operator will be understated. (SPR00050476)

Workaround: Have validation operators complete the entire batch within a single session and refrain from suspending the batch.

Error Launching Administration

In some cases after installing Kofax Transformation Modules Pro with Advanced Reports, the following error occurs when launching the Kofax Capture Administration module:

The following custom module components cannot be found or are not registered with Kofax Capture:

RepModSetup.Driver

Click OK to start this module without the custom components. To avoid this message the next time you start this module, register or remove the custom components.

This might occur if you install Kofax Transformation Modules 3.5 (Base), then install Advanced Reports, and then install Kofax Transformation Modules 3.5 (Professional). (SPR00050515)

Workaround: Click OK to dismiss the error message and then shut down the Administration module. Then, select "Repair" in Add/Remove Programs for the Kofax Capture Advanced Reports 3.0 installation.

Program Group Not Removed

When uninstalling Advanced Reports, the Data Export icon is not removed from the Advanced Reports program group. (SPR00050525)

Workaround: Manually remove the icon after uninstalling Advanced Reports.

User Id Displayed for Operator in Workflow Management Reports

In the Workflow Management Reports, the user ID is displayed for the operator, instead of the user name. (SPR00057697)

Documentation Corrections

Note the following corrections to user documentation.

Kofax Capture Advanced Reports Installation Guide

In the *Installing Advanced Reports Server* section, Step 2 of the procedure "To install Advanced Reports Server" should read as follows: (SPR00057333)

Run the following located in your installation folder:

- For SQL Server Express: STEP 2 - Advanced_Reports_Server.msi
- For SQL Server: Advanced_Reports_Server.msi

Kofax Capture Advanced Reports User's Guide

In the *Kofax Capture Advanced Reports Release Notes* section, items in Step 3 of the procedure "To add the workflow agent to a batch class" should read as follows: (SPR00057334)

"Select the Queues tab" should read "Select the Workflow Agents tab".

"Configure Advanced Report Batch Fields" should read "Set up Advanced Reporting for Batch-level Keys".

Upgrading to Kofax Capture Advanced Reports 3.1

You can now upgrade to Kofax Capture Advanced Reports 3.1, from Kofax Capture Advanced Reports 3.0 only. It is no longer necessary to uninstall the previous version first. Upgrading an earlier version of Kofax Capture Advanced Reports is not supported.

► To upgrade the Kofax Capture Advanced Reports server

- 1 At the server, shut down any applications (including the Control Panel, virus detection software and toolbars) that might be running.
- 2 Run the following located in your installation folder:
 - For SQL Server Express: STEP 2 - Advanced_Reports_Server.msi
 - For SQL Server: Advanced_Reports_Server.msi

The installation detects file paths from the Kofax Capture installation.

- 3 Follow the on-screen instructions to complete the installation.

The installer also performs a silent database upgrade.

Important Following the upgrade of the database, be sure to verify whether or not the upgrade was successful. To do so, view the ReportingDBUtil.log file (typically located in *KofaxCaptureServerName\CaptureSV\Logs\Advanced Reports*, where *KofaxCaptureServerName* is the name of the server on which Kofax Capture is installed).

► To upgrade the Kofax Capture Advanced Reports client workstation

- 1 At the client workstation, shut down any applications (including the Control Panel, virus detection software, and toolbars) that might be running.
- 2 Navigate to the Kofax Capture Server Files folder. Open the WrkInst\Advanced Reports folder.
- 3 Run Advanced_Reports_Workstation.msi.
The installation detects file paths from the Kofax Capture installation.
- 4 Follow the on-screen instructions to complete the installation.

► To upgrade the Kofax Capture Advanced Reports Viewer

- 1 At the client workstation, shut down any applications (including the Control Panel, virus detection software, and toolbars) that might be running.
- 2 Navigate to the Kofax Capture Server Files folder. Open the WrkInst\Advanced Reports folder.
- 3 Run Advanced_Reports_Report_Viewer.msi. The installation detects file paths from the Kofax Capture installation.
- 4 Follow the on-screen instructions to complete the installation.

Crystal Reports and Kofax Capture Advanced Reports Viewer are upgraded and configured.

Installing on a Remote Site for Kofax Capture Network Server

Follow these instructions to install Kofax Capture Advanced Reports and Kofax Capture Advanced Reports Viewer for Kofax Capture Network Server.

Perform the installation on the applicable remote site server and/or standalone, and remote site workstation.

► **To install Kofax Capture Advanced Reports on a remote site server or standalone**

- 1 At the remote site server or standalone, shut down any applications (including the Control Panel, virus detection software, and toolbars) that might be running.
- 2 Navigate to the Kofax Capture Server Files folder on the central site server. Open the WrkInst\Advanced Reports folder.
- 3 Run Advanced_Reports_Workstation.msi.
The installation detects file paths from the Kofax Capture installation.
- 4 Follow the on-screen instructions to complete the installation.
- 5 Copy the following files from the central site server (from the config folder where Kofax Capture Advanced Reports is installed) to the local computer (to the config folder where Kofax Advanced Reports is installed):
 - AdvancedReportsModuleNameMapping.ini
 - AdvancedReportsModuleReference.ini

► **To install Kofax Capture Advanced Reports on a remote site workstation**

- 1 At the remote site workstation, shut down any applications (including the Control Panel, virus detection software, and toolbars) that might be running.
- 2 Navigate to the Kofax Capture Server Files folder on the central site server. Open the WrkInst\Advanced Reports folder.
- 3 Run Advanced_Reports_Workstation.msi.
The installation detects file paths from the Kofax Capture installation.
- 4 Follow the on-screen instructions to complete the installation.

► **To install Kofax Capture Advanced Reports Viewer on a remote site server or standalone**

- 1 At the remote site server or standalone, shut down any applications (including the Control Panel, virus detection software, and toolbars) that might be running.
- 2 Navigate to the Kofax Capture Server Files folder on the central site server. Open the WrkInst\Advanced Reports folder.
- 3 Run Advanced_Reports_Report_Viewer.msi.
The installation detects file paths from the Kofax Capture installation.
- 4 Follow the on-screen instructions to complete the installation.
- 5 Copy the KPSGStatisticsConnectionInfo.xml file from the central site server (from the config folder where Kofax Capture Advanced Reports is installed) to the local computer (to the config folder where Kofax Advanced Reports is installed).

► **To install Kofax Capture Advanced Reports Viewer on a remote site workstation**

- 1 At the remote site workstation, shut down any applications (including the Control Panel, virus detection software, and toolbars) that might be running.
- 2 Navigate to the Kofax Capture Server Files folder on the central site server. Open the WrkInst\Advanced Reports folder.

- 3 Run `Advanced_Reports_Report_Viewer.msi`.
The installation detects file paths from the Kofax Capture installation.
- 4 Follow the on-screen instructions to complete the installation.

Removing Kofax Capture Advanced Reports for SQL Server Express on a 64-Bit System

On a 64-bit system, follow the instructions in the *Removing Advanced Reports for SQL Server Express* section in the *Kofax Capture Advanced Reports Installation Guide*, with the following change for step 4 only:

The SQL Server Express instance uninstaller must be run manually. To find the location of this program, open the Regedit tool (Start | Run | type “regedit”) and navigate to the following key:

For a 32-bit system:

HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Windows\CurrentVersion\Uninstall

For a 64-bit system:

HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Microsoft\Windows\CurrentVersion\Uninstall

Additional Resources

The following resources are available with this release.

Related Documentation

These release notes are a supplement to the following Kofax Capture Advanced Reports 3.1 documentation:

- Kofax Capture Advanced Reports Installation Guide
- Kofax Capture Advanced Reports User's Guide
- Kofax Capture Advanced Reports Database Notes

Note For a copy of the *Kofax Capture Advanced Reports Overview Guide*, which provides samples of the available reports, go to news.kofax.com.

Technical Assistance for Your Kofax Product

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

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

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

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

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

