Kofax Transformation Modules

5.5.2

Release Notes

KOFAX

Contents

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.

Note that Kofax Transformation Modules 5.5 Service Pack 2 is also referred to as Kofax Transformation Modules 5.5.2.

Information about supported operating systems and other Kofax Transformation Modules requirements is available on the Kofax Support Web pages at www.kofax.com.

Installation

This section provides information about installing Kofax Transformation Modules 5.5 Service Pack 2.

Kofax recommends that you review the *Installation Guide for Kofax Transformation Modules 5.5* before installing this service pack as it contains important information about Kofax Transformation Modules, including known limitations, installation requirements and software prerequisites.

Important Kofax Transformation Modules 5.5 Service Pack 2 has been fully tested and certified with Kofax Transformation Modules 5.5.0_R2. However, as with any service pack, Kofax recommends that you install and test this Kofax Transformation Modules 5.5 Service Pack 2 in a development environment first before applying it to your production environment.

Important You can only uninstall the various components of the service pack if you have access to the Kofax Transformation Modules 5.5.0_R2 installation. If this installation media cannot be accessed a message box is displayed and the uninstallation is terminated. You need to insert the installation DVD or mount the installation ISO and then restart the uninstallation.

Service Pack 2 Prerequisites

To ensure successful installation of the service pack, the following prerequisites are required:

- Be sure that you have full Windows administrative privileges.
- Certify that Kofax Capture and Kofax Transformation Modules 5.5.0_R2 or a later version are installed before applying this service pack.

  Note If you do not have version 5.5.0_R2 of Kofax Transformation Modules installed, you must first upgrade to that version. To upgrade from a version of Kofax Transformation Modules earlier than 5.0, you need to remove the earlier version before installing Kofax Transformation Modules 5.5.0_R2. You can install Kofax Transformation Modules 5.5.0_R2 over top of Kofax Transformation Modules 5.0.

  If you install Kofax Transformation Modules for Windows 7 or Windows 2008 R2, verify that the software prerequisites are installed correctly. Before installing Kofax Transformation Modules, you must first use the role management tool of the operating system to enable Microsoft .NET Framework 3.5 SP1. You can achieve this via Server manager in Server 2008, and via Programs and Features in Windows 7.

- Close all Kofax Transformation Modules applications and services.

Installing Kofax Transformation Modules Service Pack 2

The following steps explain how to install Kofax Transformation Modules 5.5 Service Pack 2.

▶ **To install the Kofax Transformation Modules service pack**

1. Download the Kofax Transformation Modules 5.5 Service Pack 2 from the Kofax website.
2. Mount the ISO image.
3. Select the installer directory for Kofax Transformation Modules 5.5 Service Pack 2.
4. Run the executable file (KofaxTransformationModules -5.5.2.exe) to install the service pack.
5. Follow the installation instructions presented to you and when you are notified that the installation process has been successfully completed, click OK to clear the confirmation message.
6. These instructions must be applied to each client and standalone workstations running Kofax Transformation Modules.

For an advanced installation, use KofaxTransformationModules-5.5.2.msp. You can also enable a detailed log as a diagnostic tool from the command prompt.

▶ **To install the service pack from the command prompt**

1. Run the installation with the following command from the location where the downloaded .msp file is stored:

   ```
   msiexec /update KofaxTransformationModules-5.5.2.msp
   REINSTALL=ALL
   ```

2. Use the /L switch to enable logging.

   `/L*v C:\KTM-5.5.2.log` generates a log to C:\KTM-5.5.2.log.

Uninstalling Kofax Transformation Modules Service Pack 2

To ensure successful uninstallation of the service pack, you must have full Windows administrative privileges.

Important If you have the Arabic OCR engine installed Kofax highly recommends to change the installation and remove the Arabic OCR engine prior to uninstalling the service pack. There is a known issue for uninstalling the service pack when the Arabic OCR engine is installed that may cause Project Builder to abnormally terminate.

▶ **To uninstall the Kofax Transformation Modules service pack**

1. Terminate all running Kofax Transformation Modules applications and services.
2. From the control panel, select Add and Remove Programs. For Windows Vista or Windows 7, select Programs and Features.
3. Select Show updates option. For Windows Vista and Windows 7, select View installed updates.

4. From the listed programs, select Kofax Transformation Modules 5.5 Service Pack 2 and click Remove. For Windows Vista or Windows 7, select Uninstall.

   Note Uninstalling Kofax Transformation Modules 5.5 Service Pack 2 removes only the service pack; Kofax Transformation Modules 5.5.0_R2 remains on your computer.

Installing Thin Client Server Service Pack 2

The following steps explain how to install the Thin Client Server component in Kofax Transformation Modules 5.5 Service Pack 2.

Kofax recommends that you review the Kofax Transformation Modules 5.5 Thin Client Server Installation Guide before installing this service pack component as it contains important information, including known limitations, certification information, installation requirements, software prerequisites, and Windows service pack issues.

Note You can install the service pack on top of the existing Kofax Transformation Modules 5.5 Thin Client Server product.

To ensure successful installation of the Thin Client Server service pack, the following prerequisites are required:

- Be sure that you have full Windows administration privileges.
- Verify that Kofax Capture is installed. If you are using domain log on credentials, Kofax Capture 9.0 SP1 is required.
- Verify that Kofax Transformation Modules 5.5.0_R2 or a later version and Kofax Transformation Modules - Thin Client Server 5.5.0_R2 are installed. If you do not have version 5.5.0_R2 of Kofax Transformation Modules, you must upgrade to it.
- Close all Kofax Transformation Modules applications and services.
- Verify that Internet Information Services (IIS) 6 or later is installed.
- Close all applications (including Control Panel, virus detection software, and toolbars) that are running.
- To be able to restore customization settings, Kofax recommends that you make a backup copy of the following configuration files:
    1 **Web.config** file, which is located inside the root folder of the Kofax Transformation Modules - Thin Client Server installation path.
    2 **KCThinClientModule.exe.config** file, which is located inside the \bin folder of the Kofax Capture installation.

▶ **To install the Thin Client Server component of Kofax Transformation Modules 5.5 Service Pack 2**

1. Download the Kofax Transformation Modules 5.5 Service Pack 2 from the Kofax website.
2. Mount the ISO image.
3. Select the installer directory for Kofax Transformation Modules 5.5 Service Pack 2.
4. Run the executable file (KofaxTransformationModules -ThinClientServer-5.5.2.exe) to install the Thin Client Server component of Kofax Transformation Modules 5.5 Service Pack 2.

5. Follow the installation instructions presented to you and when you are notified that the installation process has been successfully completed, click OK to clear the confirmation message.

6. These instructions must be applied to each server running Thin Client Server component of Kofax Transformation Modules - Thin Client Server.

▶ **To restore Thin Client Server customization settings**

1. Open the newly installed configuration files in a text editor.

2. Apply any custom modifications you had before by comparing them with the files backed up as part of the prerequisites.

Note Do not replace the configuration files with the backup of the original files after installing the Thin Client Server component of Kofax Transformation Modules 5.5 Service Pack 2. This may overwrite new settings introduced by the service pack.

Uninstalling Thin Client Server Service Pack 2

To ensure successful uninstallation of the Thin Client Server service pack, you must have full Windows administrative privileges.

▶ **To uninstall the Thin Client Server service pack**

1. Terminate all running Kofax Transformation Modules applications and services.

2. From the control panel, select Add and Remove Programs. For Windows Server 2008, select Programs and Features.

3. Select Show updates option. For Windows Vista and Windows 7, select View installed updates.

4. From the listed programs, select Kofax Transformation Modules - Thin Client Server 5.5 Service Pack 2 and click Remove. For Windows Server 2008, select Uninstall.

Note Uninstalling Kofax Transformation Modules - Thin Client Server 5.5.2 removes only the service pack; Kofax Transformation Modules - Thin Client Server 5.5.0_R2 remains on your computer.

Installing the Kofax Search and Matching Server Service Pack 2

This section provides instructions for installing the Kofax Search and Matching Server Service Pack 2.

Kofax recommends that you review the Kofax Search and Matching Server 5.5 Installation Guide before installing this service pack component as it contains important information, including known limitations, certification information, installation requirements, software prerequisites, and Windows service pack issues.

Important You can only install the Kofax Search and Matching Server Service Pack 2 if you have installed the Kofax Search and Matching Server 5.5.0_R2. However, if you have installed Kofax Search and Matching Server 5.5 already you need to uninstall this first and then install Kofax Search and Matching Server 5.5.0_R2.

▶ **To install the Kofax Search and Matching Server Service Pack 2**

1. Download the Kofax Transformation Modules 5.5 Service Pack 2 from the Kofax website.

2. Mount the ISO image.

3. Install Kofax Search and Matching Server 5.5.0_R2.

    a. From the installer directory for Kofax Transformation Modules 5.5 Service Pack 2 select Kofax Search and Matching Server (KSMS 5.5.0 R2)\Full Installer (64-bit).

    b. Run setup.exe.

4. Then install Kofax Search and Matching Server 5.5 Service Pack 2. Select the installer directory for Kofax Transformation Modules 5.5 Service Pack 2 for Kofax Search and Matching Server Full Installer (64-bit).

5. Run the executable file (KSMS-5.5.2.exe) to install the Kofax Search and Matching Server component of Kofax Transformation Modules 5.5 Service Pack 2.

6. Follow the installation instructions presented to you and when you are notified that the installation process has been successfully completed, click OK to clear the confirmation message.

Uninstalling the Kofax Search and Matching Server

You can uninstall the Kofax Search and Matching Server service pack if you have full Windows administrative privileges.

▶ **To uninstall the Kofax Search and Matching Server service pack**

1. Terminate all running Kofax Search and Matching Server applications and services.

2. From the control panel, select Add and Remove Programs. For Windows Vista or Windows 7, select Programs and Features.

3. Select Show updates option. For Windows Vista and Windows 7, select View installed updates.

4. From the listed programs, select Kofax Search and Matching Server 5.5 Service Pack 2 and click Remove. For Windows Vista or Windows 7, select Uninstall.

    Note Uninstalling Kofax Search and Matching Server 5.5.2 removes only the service pack; Kofax Search and Matching Server 5.5.0_R2 remains on your computer.

Installing the Kofax Search and Matching Server Administration Service Pack 2 on a 32-Bit Operating System

This section provides instructions for installing the Administration Service Pack 2 on a 32-bit operating system.

Important You can install theAdministration Service Pack 2 only if you have installed the Kofax Search and Matching Server 5.5.0_R2. However, if you have installed Kofax Search and Matching Server Administration 5.5 already you need to uninstall this first and then install Kofax Search and Matching Server Administration 5.5.0_R2.

▶ **To install the Kofax Search and Matching Server Administration Service Pack 2**

1. Download the Kofax Transformation Modules 5.5 Service Pack 2 from the [Kofax website](#).

2. Mount ISO image.

3. Install Kofax Search and Matching Server Administration 5.5.0_R2.

   a. From the installer directory for Kofax Transformation Modules 5.5 Service Pack 2 select Kofax Search and Matching Server (KSMS 5.5.0 R2)\Administration (32-bit).

   b. Run setup.exe.

4. Select the installer directory for Kofax Transformation Modules 5.5 Service Pack 2 for Kofax Search and Matching Server Administration (32-bit).

5. Run the executable file (KSMA-5.5.2.exe) to install the Kofax Search and Matching Server Administration component of Kofax Transformation Modules 5.5 Service Pack 2 on a 32-bit operating system.

6. Follow the installation instructions presented to you and when you are notified that the installation process has been successfully completed, click OK to clear the confirmation message.

Uninstalling the Kofax Search and Matching Server Administration

You can uninstall the Kofax Search and Matching Server Administration using the Add or Remove Programs utility (or, on a Windows Vista computer, the Programs and Features utility).

▶ **To uninstall the Kofax Search and Matching Server Administration service pack**

1. Terminate the Kofax Search and Matching Server Administration.

2. From the control panel, select Add and Remove Programs. For Windows Vista or Windows 7, select Programs and Features.

3. Select Show updates option. For Windows Vista and Windows 7, select View installed updates.

4. From the listed programs, select Kofax Search and Matching Server Administration 5.5 Service Pack 2 and click Remove. For Windows Vista or Windows 7, select Uninstall.

Note Uninstalling Kofax Search and Matching Server Administration removes only the service pack.

New Features

This section contains information about the new features in Kofax Transformation Modules 5.5 and any later service packs.

Kofax Transformation Modules Service Pack 2

This section contains information about the new features in Kofax Transformation Modules 5.5 Service Pack 2.

New Kofax Capture"KTM for Forms" License Supported

Kofax Transformation Modules now supports the "KTM for Forms" license. This license enables you to utilize a constricted set of Kofax Transformation Modules functionality for every licensed Kofax Capture version.

Note When you add Kofax Transformation Modules to your workflow and run a Kofax Transformation Modules user interactive module a station license is consumed similar to the behavior of the Kofax Capture modules. This means you can run several Kofax Transformation Modules or Kofax Capture modules on the same computer that require one station license. However, when using Kofax Transformation Modules Thin Clients, a station license for each Thin Client module is needed.

Recognition - New Arabic OCR Engine

A new Arabic OCR engine, iDRS form I.R.I.S. S.A., is provided that can recognize Arabic text with embedded English and French characters. This engine replaces the VERUS OCR engine from Novodynamics. The new engine can run on 32-bit as well as 64-bit operating systems.

Projects using the VERUS engine for page and zone profiles are automatically updated when the project is loaded within Project Builder or when processed with Server. However, Kofax highly recommends to check the default properties from the automated update as adjusted properties can increase the recognition results for the new engine.

Important As the current documentation and help files are not updated with this service pack the [documentation](#) for the new properties are included in the release notes.

Kofax Transformation Modules Service Pack 1

This section contains information about the new features in Kofax Transformation Modules 5.5 Servic Pack 1.

Classification - Allow Setting "pXDoc.ClassificationUnconfident" Flag From Script

The XDocument `ClassificationUnconfident` property was read-only before, but can now be set in classification script, which makes it possible to mark a document as unconfidently classified so that it is shown in Document Review. (SPR00072530)

See the following sample script:

```
Private Sub Document_AfterClassifyXDoc(ByVal pXDoc As CASCADELib.CscXDocument)
  ' force all documents of class "MyClass" to be reviewed in Document Review
  If pXDoc.ExtractionClass = "MyClass" Then
    pXDoc.ClassificationUnconfident = True
  End If
End Sub
```

Server - Execute Document Review Rules

Document Review rules are now executed in Server so that it is possible to apply scripting depending on the output of these rules, such as skipping the Document Review module with those batches that have no problems. (SPR00069512)

Document Review rules are only executed in Server instance 1 before the `Batch_Close` event gets fired, but only if the `CloseMode` has one of the following values:

- `CscBatchCloseFinal`
- `CscBatchCloseParent`

- `CscBatchCloseChild`

If the batch gets split into several child batches as a result of the first call to `Batch_Close`, then the Document Review rules are executed again for any of the new batches before the corresponding `Batch_Close` event is fired with `CloseMode` set to `CscBatchCloseParent` or `CscBatchCloseChild`. The result of the Document Review rules is stored in the `DocumentReview.IsProblem` property of every XDocInfo and XFolder object. The script below shows a sample implementation for the `Batch_Close` event that skips the Document Review module if there are no problems for any document and the root folder.

```
Private Sub Batch_Close(ByVal pXRootFolder As CscXFolder, ByVal CloseMode As
 CscBatchCloseMode)
  If Project.ScriptExecutionMode = CscScriptExecutionMode.CscScriptModeServer And _
      Project.ScriptExecutionInstance = 1 Then

      Dim DocIndex As Integer
      Dim bAnyProblemFound As Boolean

      ' check the document review rules on the root folder and all documents
      ' and skip the document review module if there are no problems
      bAnyProblemFound = pXRootFolder.DocumentReview.IsProblem
      For DocIndex = 0 To pXRootFolder.DocInfos.Count-1
        Dim oXDocInfo As CscXDocInfo
        Set oXDocInfo = pXRootFolder.DocInfos.ItemByIndex(DocIndex)
        If oXDocInfo.DocumentReview.IsProblem = True Then
            bAnyProblemFound = True
        End If
      Next

      If bAnyProblemFound = False Then
        ' skip the document review module and assign this batch
        ' immediately to KTM Server 2
        pXRootFolder.XValues.Set("KTM_DOCUMENTROUTING_QUEUE_THISBATCH", "KTM.Server2")
      End If

  End If
End Sub
```

Service Configuration Tool - New Option to Specify Server Instance

When launching Kofax Transformation Modules Server as a module, you can use the command line option /I 1 or /I 2 to specify which instance to run. When running the service, there was no such option, and the default was used: alternating between polling each queue. (SPR00088399)

Now there is a new option for the service in the Service Configuration tool. Possible values for this option are:

- Batch processing polls queue for server instances 1 + 2 (default)
- Batch processing polls queue for server instance 1
- Batch processing polls queue for server instance 2

Kofax Capture Integration - Batch Filtering Feature for User Interactive Modules and Thin Clients

The user interactive modules Validation, Document Review, Verification and Correction, and the Thin Clients now support the new Kofax Capture batch filtering functionality. If you enable filtering on the "Open Batches," respectively "Available Batches" window, you can define and enable various filters to reduce the number of batches listed for processing. This new functionality is available only if you have Kofax Capture 10 installed.

Note that this feature has already been introduced in Kofax Transformation Modules 5.5 Fix Pack 1 (SPR00070567) and Kofax Transformation Modules 5.5 Thin Clients Fix Pack 1 (SPR00070567).

Note For more information, see [Additional Documentation](#).

Kofax Capture Integration - Standard Reports

All custom modules in Kofax Transformation Modules and the Thin Clients now fully support Kofax Capture standard reports.

The following section contains details about the new available statistics. For more information about the standard reports, see *Standard Queries* in *Kofax Capture Help*.

Module Productivity and User Productivity Reports

For the Module Productivity and the User Productivity reports, all custom modules in Kofax Transformation Modules and the Thin Clients now collect statistical data about the number of completed documents and the number of keystrokes performed by an operator. This data is then available to the Kofax Capture standard reports. (SPR00048129)

In the Module Productivity report list, the "Completed Documents" data indicates the completed status of a document in each module, with regards to the processing step. For example, a document is processed by Server, and (due to the applied validation rules) marked as valid. This document is counted as "completed" for the server step. Passing this document on to the Validation module, it is already valid and no interaction is needed. This document then is counted as well as "completed" for the Validation module.

Key strokes are counted in the same way as in Kofax Capture; every keystroke is counted, except when pressing CTRL, SHIFT and ALT.

Note For the Batch Summary and the System Status reports, there is no change. The statistics data collection has already been supported by the custom modules.

New Features in Kofax Transformation Modules 5.5.0_R2

This section contains information about new features provided with the Kofax Transformation Modules 5.5.0_R2 and earlier fix packs.

Validation - Force All Fields to Be Valid

A new menu and toolbar command is available in Validation and Test Validation to force all fields to become valid. (SPR00069991)

Batch Filtering for Validation, Document Review, Verification, Correction and Thin Clients

Batch filtering, a new Kofax Capture 10 functionality, is now supported by Kofax Transformation Modules. In the "Open Batch", respectively, "Available Batches" window you can select Filter to add and enable various filters. A filter reduces the number of batches listed for processing according to the selected values. This new functionality is available only if you have Kofax Capture 10 installed. (SPR00070567, SPR00070567)

Changes in Behavior

The following changes have been made to the behavior of Kofax Transformation Modules 5.5 and any later service pack.

Kofax Transformation Modules Service Pack 2

The following changes have been made to the behavior of Kofax Transformation Modules 5.5 Service Pack 2.

VERUS Arabic OCR Removed

The existing VERUS Arabic OCR engine is replaced by iDRS Arabic OCR engine. Existing projects created with an earlier Kofax Transformation Modules version that use the VERUS engine for page and zone profiles are automatically updated.

Changed Silent Install Parameters

In order to provide silent install for the new Arabic OCR engine iDRS from I.R.I.S. a new parameter is introduced that is called IDRS.

IDRS=1 installs the new Arabic OCR engine. For more details about silent installation, see *Kofax Transformation Modules Installation Guide*.

Kofax Transformation Modules 5.5 Service Pack 1

The following changes have been made to the behavior of Kofax Transformation Modules 5.5 Service Pack 1.

Service Configuration Tool - New Option

The Service Configuration tool provides a new option, "Batch processing polls queue for server instances" that can be selected when "Automatic start of batch processing" is enabled. It defines the server instances the queue is polled for from batch processing.

Resolved Issues

The following problems have been resolved in Kofax Transformation Modules 5.5 and any later service pack.

Kofax Transformation Modules 5.5 Service Pack 2

The following problems have been resolved in Kofax Transformation Modules 5.5 Service Pack 2.

Error When Performing OCR with Abbyy FineReader

When performing OCR on some specific images of poor quality, the error "Catastrophic failure" no longer occurs, and, as expected, the documents do not have any OCR result. (SPR00091266)

Problem When Using Mixed Print Profile Together with Trainable Group Locator

The combination of a mixed print profile and a trainable group locator on the same document does not corrupt the document and produce an error anymore. (SPR00096136)

Kofax Transformation Modules 5.5.1 Fix Pack 1

The following problems have been resolved in Kofax Transformation Modules 5.5.1.1.

Partial Batch Export

In Partial Batch Export mode, the batch is routed to the next module in queue when it is closed or rejected, and all not rejected documents are finally exported.

An error, which abnormally terminates a module, stops the batch from proceeding in the workflow. In case of a viable application level error, the batch is closed or rejected, and all not yet processed documents must therefore be rejected to prevent them from being exported.

Kofax Transformation Modules now supports this behavior, with the exception of Correction and Thin Clients - see Known Problems. (SPR00085407)

Database Locator Returns No Results after Reloading the Project

After saving and reloading a project that contains a correctly configured Database Locator configured for a Remote Fuzzy Database for a relational database, the Database Locator did not return any results. Now the database file separator settings are correctly saved and loaded within the project and the Database Locator returns the expected results after reloading the project. (SPR00092168)

Important To fix this problem for any projects that have been created with an earlier Kofax Transformation Modules version and that contain such a Database Locator, you need to open those projects in Project Builder, refresh all affected Remote Fuzzy Databases that have a relational database source, and then save the project again.

KTM Statistics Export Connector Error after Structural Change in Validation

Adding a page or document in batch edit mode in Validation now properly updates the image file names to the name preset by Kofax Capture, and no subsequent error in the KTM Statistics export connector is displayed. (SPR00091993)

Fuzzy Database Was Deleted on Remote Site by Validation Database Lookup or Database Lookup-Script

If a batch for a project that has a Local Fuzzy Database configured is extracted on a central site and Validation is performed on a remote site, then the database file located in `PubTypes \Custom\...` was deleted when the Database Lookup Button or the script function `db.search` was executed.

The same problem occurred for a local folder (for example, `C:\00201562 KTM DB RS DB \Vendor.txt`) and with FQDN (for example, `\\servername\CaputreSV\Vendor.txt`) for the import file names. The problem only ocurred if automatic update was disabled. Now fuzzy databases are no longer deleted on remote sites. (SPR00091823)

Server Is Not Behaving Correctly in Partial Batch Export Mode

If you processed a batch in partial batch export mode and a script error occurred, for example a runtime error in the `Application_InitializeBatch` event, this caused the Server to close the batch without rejecting it. Now the Server behaves consistently. In addition, when a batch needs to be rejected all its documents are set to rejected. (SPR00092214)

Line Item Matching Locator Overrides Matched PO when Vendor Not Matched

The Line Item Matching Locator ignored line items if the given vendor ID did not match the Vendor ID of the PO Number. This has been fixed by always considering the PO Numbers

that are found on the document, even if no matching vendor ID was found. (SPR00080431, SPR00080412)

Document Routing to a Different Child Class Should Not Create a BatchSeparated Flag

Document separation was suppressed by the BatchSeparated flag when a document is routed to a child batch with a different batch class. Now, when document routing is applied, document separation is performed for child batches that are routed to a new batch class that has document separation configured. In addition, document separation is not executed for child batches that are routed to the same batch class as the parent batch. (SPR00092303)

Kofax Transformation Modules 5.5 Service Pack 1

The following problems have been resolved in Kofax Transformation Modules 5.5 Service Pack 1.

Digital Certificate Expired

The digital certificate that is used to sign the shipping version of Kofax Transformation Modules was expired. (SPR00094810)

Now all files are signed with the time stamping option so that the code stays valid even when the certificate expires.

Document Review - Error When Confirming a Suggested Class

An object reference error was generated when confirming a suggested class as the last action when reviewing a batch and no other batches are awaiting review. (SPR00088478)

Document Review Not Tolerant to Inaccessible Images Folder

If the network was slow or failure prone at batch start, forcing a document to be valid in Document Review led to an abnormal termination of the module. (SPR00091066)

Now the High Availability mechanism handles this problem, and retries until it succeeds as defined in Kofax Capture.

Extraction - Line Item Matching Locator Picking up Wrong Line Item Details from Purchase Order

Passing an invoice through Kofax Transformation Modules - Validation using Line Item Matching Locator, the results were incorrectly matching a line item ID with wrong description. (SPR00079979)

Matches that have only the total amount matched **and** are ambiguous now are no longer tolerated.

Extraction - Line Item Matching Locator Did Not Return Line Items Correctly

Line Item Matching Locator only used the top-most vendor ID from the input locator. If the correct vendor ID appeared later in the list of alternatives, no PO Items were found. (SPR00091966)

By considering the top 10 alternatives from the input locator for the vendor ID, Line Item Matching Locator now returns the line items correctly.

Extraction - Reclassification Via Script Failed

Since Kofax Transformation Modules 5.5 it is possible to call `pXDocument.Reclassify` multiple times during extraction. Unfortunately, this caused a change in behaviour

for the `pXDocument.Reclassified` flag that was always set to false even if `pXDocument.Reclassify` was called in the extraction step of this document. (SPR00089911)

Now the `pXDocument.Reclassified` flag is set to true if the document is reclassified in scripting during extraction. Please note that the `pXDocument.Reclassified` is set to false if the reclassification in script happened during the classification script sequence. This is as designed and consistent with the behaviour in earlier versions.

Advanced Zone Locator Failed with Virtual Address Error

This error occurred when processing OMR groups with Advanced Zone Locator on some specific images. (SPR00091407)

Extraction - Poor Aztec Bar Code Recognition

The Aztec bar code type was recognized with poor quality. (SPR00091553)

The recognition is now improved by introducing the Abbyy FineReader version 9.0.1.773 patch.

Project Builder - Script Variables/Script Resources

When changing items within Script Variable (or Script Resources window), and then closing the window, you were never asked if you want to save the changes. (SPR00090666, SPR00090670)

Now, when there is a change, pressing Cancel, "X" (Close button) or ESC launches a message box so that no changes get lost by accident.

Extraction - Database Locator Failure

When processing specific documents where a single page had more than 1024 words, the Database Locator could fail with the following error message: "Extraction failed because: the execution of a locator method failed. Class = '<class name>', Locator='<locator name>', Original error message: Unknown error in Fox Library occurred: StructureException. The thread tried to read from or write to a virtual address for which it does not have the appropriate access." (SPR00095749)

Project Builder - Script Breakpoint Prevented Debugging in Test Validation

If a breakpoint was set in script and hit during Test Validation, then the Script window was not displayed anymore and Project Builder was blocked. (SPR00091268)

Script debugging is now allowed in Test Validation. Therefore the Show Script button is always enabled now, while "Activate Script Debugging" is never enabled in Test Validation.

Project Builder - Table Column Renaming Problems

If you changed the name of a column in the Project Builder - Project Settings - Tables - Column Pool then any settings that have been made in a table field, which uses the column in a table model were lost. (SPR00090780)

Settings in the table field are now properly changed.

Project Builder - Unwanted Image Cleanup Methods

Both selected and not selected image cleanup methods were listed in the Image Cleanup profile list in the project settings. This was confusing as you could not see what was active or not. (SPR00090971)

These names have been removed and only the used methods are displayed.

Advanced Zone Locator - Manual Anchors on Stretched Images

On a stretched image, the zones were not adjusted even though all anchors were found correctly. (SPR00091671)

Project Builder - Separation Benchmark Problems with Large Golden Batches

For large golden batches (containing more than 1000 documents), the Separation Benchmark feature terminated before completion with graphical display problems, and the following error message was displayed: "A generic error occurred in GDI+." (SPR00095669)

Remote Fuzzy Databases Connection Error

Sometimes when accessing a remote fuzzy database the following error message: "None of the configured fuzzy database server is available." was displayed. (SPR00094678)

Due to network issues or heavy workload the connection to the Kofax Search and Matching Server timed out. By default, the value for the time out is now set to 10000 ms. If needed, you can change the default value by increasing the number for the timeout registry key:

```
HKEY_LOCAL_MACHINE\SOFTWARE\(Wow6432Node)\Kofax\Transformation
\4.0\RemoteFuzzyDatabaseServer\PingTimeOut
```

Database Import in Kofax Search and Matching Server Administration With Federal Information Processing Standard Activated

When activating the Federal Information Processing Standard (FIPS) on the system running Kofax Search and Matching Server, the import of any database no longer fails and an already imported database can be activated in Kofax Search and Matching Server Administration. (SPR00095315)

Kofax Search and Matching Server Upload Issue

When a database was imported, Kofax Search and Matching Server did not use the Upload directory based on the path specified in the registry, but always used the default path to create an upload folder. (SPR00091282)

Kofax Search and Matching Server Administration User Interface Problem

You can now open the General Settings window when using a Microsoft SQL Server or Oracle database that does not have stored procedures. (SPR00090771)

Server - Database Locator Failure

In case the database settings became inconsistent by replacing an existing remote fuzzy database with different word separation characters, and without updating the corresponding Kofax Transformation Modules project, Server could fail with the following error message: "KTM Server: There was an error reading from the pipe: The pipe has been ended." (SPR00095091)

Server Scheduler Service Stopped Responding

The Server Scheduler Service stopped communicating, which caused MailroomProcess to terminate with a timeout. Kofax Transformation Modules - Server log file contained the following error message: "This request operation sent to net.tcp://localhost:5000/SchedulerSessionPipe did not receive a reply within the configured timeout (00:10:00). The time allotted to this operation may have been a portion of a longer timeout. This may be

because the service is still processing the operation or because the service was unable to send a reply message. You may consider to increase the operation timeout (by casting the channel/proxy to IContextChannel and setting the OperationTimeout property) and ensure that the service is able to connect to the client." The problem happened sporadically and was not related to specific documents. (SPR00095347, SPR00095531)

Server - Allow to Rotate a PDF

When Server recognizes that a page needs to be rotated (the OCR engine detects it), it now corrects it automatically. This was the normal behavior for TIFFs before, but not for PDF files. The PDF is still a read-only type of document therefore only the rotation flag in XDocument is corrected. The PDF file remains untouched. Note that the manual rotation of PDF documents in Validation and Document Review is not allowed. (SPR00073016)

Thin Clients - Internet Explorer 9 Support

Kofax Transformation Modules - Thin Client Server and the Thin Clients now support Internet Explorer 9. (SPR00087406, SPR00087407, SPR00087409, SPR00087437)

Thin Client Validation - Referenced Incorrect Image Path

When securing the Default IIS Web site, Thin Client Validation incorrectly referenced the image "bg.gif" located in `<Install Path>/js/external/extjs/resources/ images/default/toolbar/`. (SPR00091326)

Thin Client Validation - Display Issues For Database Lookup Dialog

Thin Client Validation now automatically expands all columns of Database Lookup Dialog to properly display text in headers. (SPR00090622)

Thin Client Correction Did Not Accept Empty Values

Validation rules were not executed properly in Thin Client Correction in regards to empty values. (SPR00091088)

Validation - InPlace Editor Issue

The InPlace Editor appeared floating, though disabled in the validation form, when Batch Editing was turned on and off in Validation. (SPR00094714)

The InPlace Editor panel is no longer visible as a floating window when disabling and enabling Batch Editing mode.

ValidationForm_AfterViewerLassoDrawn Issues

The `ValidationForm_AfterViewerLassoDrawn` event did not fire if the cursor was in a table cell and had a restricted firing condition. (SPR00091252, SPR00091253)

The minimum lasso size has now been increased and the event now fires if the table cell has the focus.

Validation - Out of Memory When Displaying Large Documents With Color Images

Displaying a document with 200-300 pages consumed a lot of memory (1-2 GByte). Depending on the operating system, the Validation process ran out of memory, causing the document viewer to not correctly display document pages. (SPR00092124 / SPR00095639)

This problem has been resolved by dynamically unloading images if the document has more than 10 pages.

Validation - Slow Browsing Through Pages of a Large Document

Browsing a large document with more than 300 pages in Validation could be very slow if the images directory of the batch class was on a network drive. Displaying the next page inside the same document could take up to 2-5 seconds depending on the network latency. (SPR00092127)

This has been optimized by reducing the number of network accesses during a page change.

Resolved Problems in Kofax Transformation Modules 5.5.0_R2

The following problems have been resolved in Kofax Transformation Modules 5.5.0_R2 and earlier fix packs.

Kofax Transformation Modules Installation Issue

Kofax Transformation Modules installation no longer fails for a Kofax Capture client installation on a Microsoft Windows XP SP3 operating system. (SPR00091161)

Thin Client Installation Issue

Kofax Transformation Modules - Thin Client Server can now be installed for Kofax Capture 10 without changing a registry key. (SPR00093667)

Kofax Search and Matching Server Installation Issue

Kofax Search and Matching Server can now be installed on a computer that has Microsoft SQL Server 2008 R2 (version 10.50.150.9) already available. (SPR00090192)

Extraction - Database Locator Failure

The Database Locator no longer fails during extraction on "automatic update from import file" when using the own address database from a local fuzzy database. (SPR00091297)

The Database Locators no longer fails during extraction when using the own address database from a remote fuzzy database. (SPR00091520)

Document Review - Loss of Drag-And-Drop Functionality

After a document was moved using commands from the context menu (Up, Down, Top and Bottom) the drag-and-drop operation for pages no longer functioned. You no longer have to suspend and re-open the batch to restore the drag-and-drop functionality. (SPR00089077)

Different Behavior for Combo Box Field, When Filled via Script

A different text selection behavior occurred for combo box fields, depending on how the combo box was initialized. (SPR00054280)

The text selection behavior is now consistent for combo box types, and the entire text is selected if a free content combo box gets the focus.

Statistics Viewer Returned Error

Statistics Viewer no longer returns an error if the statistics database is configured on a Microsoft SQL Server using "History ... Per Day" reports. (SPR00054061)

Relational Database Properties - Inconsistencies

Ambiguous names can no longer occur when using case-insensitive names and when using identical names for objects in different database schema. (SPR00085394)

Extraction Benchmark Does Not Show Confidence and Thresholds in Mouse Hover

In the new Extraction benchmark, mouse hover text showed only:

- Field Name
- Extracted Value
- Desired Value

(SPR00072518)

The missing "Confidence" and "Validation" thresholds are now displayed as well.

OCR Does Not Return Any Result

When using the FineReader OCR engine to perform OCR on some images, OCR does return the correct results when using lines removal for vertical lines touching the lower border. Problems due to an access violation are solved. (SPR00090307)

GDI Object Leak in Standard Evaluator

Project Builder may stop working when used over a longer period of time due to a GDI object leak. This happened especially when using the Standard Evaluator or the locator method drop-down list. (SPR00087949)

Standard Evaluator Keeps a Reference to Deleted Subfields

The Standard Evaluator often refers to other locators or their subfields. If these subfields were deleted, the Standard Evaluator still referred to them. (SPR00087961)

When opening or validating a project, the user now gets a warning about broken references. Additionally, when opening the Standard Evaluator properties, the broken references are removed and a detailed message is displayed.

Enable Project Planner to Install on 64-Bit Operating Systems

Project Planner installer used to deploy the MS SQL Express for 32-bit operating systems. (SPR00089571)

The SQL express now is replaced with the version that can be installed on 64-bit and 32-bit operating systems.

Performance Issue with Server When Processing Batches with Document Separation

When processing Kofax Transformation Modules batches using standard document separation the Kofax Transformation Modules Server Scheduler did not utilize all available cores. (SPR00089079)

A new registry key (MinUsedBatches) allows to control the minimum number of batches that are processed in parallel. This registry key must be set manually for 32-bit operating systems in

```
HKEY_LOCAL_MACHINE\SOFTWARE\Kofax\Transformation\4.0\Server
```

and for 64-bit operating systems in

```
HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Kofax\Transformation
\4.0\Server
```

Possible values for the new registry key are 2 - <number of cores>. If the new registry key does not exist, the number of batches processed in parallel is dynamically computed as before.

Document Review - Batch View Does Not Handle Document Restructuring Properly When Working With Multipage Tifs

When performing a document restructuring operation, such as move page, split or using drag-and-drop functionality, for a document made from a multipage tif the result was correctly displayed in the Document Review tree view, but the viewer displayed an image that differed from the one selected in the tree. (SPR00073027)

Document Review - "Object Reference Not Set" Error When Closing Batch

An object reference error and stack trace were raised when confirming a suggested class with Enter (not the mouse) and the batch was closed automatically or the prompt to close the batch was accepted. This only occurred when there were no batches waiting for Document Review. (SPR00094592)

Document Review - Performance Issue

Manipulating documents in Document Review with a large number of pages (>100) was significantly slow. (SPR00089311)

The performance for move, rotate, move page and drag & drop operations is now much faster on large documents. The performance for splitting a large document was improved, but is still slower compared to the other operations.

Document Review - Slow Document Navigation

Navigation through documents became very slow, for example, when processing 500 documents. The navigation speed is improved. (SPR00072204)

Document Review Does Not Report Kofax Capture Statistics

Each of the modules in Kofax Transformation Modules, with the exception of Document Review, reports a set of basic statistics to Kofax Capture. (SPR00090380)

For Document Review, the Kofax Capture standard reporting is now available on the same level of detail as in the Validation module.

Error When Processing Batches Without Documents

The modules in Kofax Transformation Modules failed to process batches that only contained released documents. (SPR00069226)

Server, Document Review, Validation, and Verification now present a message to the user: "No documents to process, batch will be closed," and the batch is then closed without an error.

Empty Connection String for Relational Database

When displaying the properties of a relational database once again the connection string is now displayed correctly and no longer empty. (SPR00073023)

Broken Binary Compatibility for ICscXDocPage Interface

The downward binary compatibility to 5.0 for ICscXDocPage interface is now restored. (SPR00090436)

Visualization Problems of Valid Anchors in Advanced Zone Locator Zone Viewer

In the Zone Viewer of the Advanced Zone Locator, there was no visual feedback anymore whether manual anchors were valid or not. (SPR00090547)

Certain 3 of 9 Bar Codes Fail to Read Using the Bar Code Locator

The Bar Code Locator failed to read certain 3 of 9 bar codes. (SPR00089048)

This problem has been resolved with Abbyy FineReader 9.0.1.773 patch.

Test Validation Abnormally Terminates

Closing the Test Validation after adding some table rows via script produced an error message caused by invalid access of the document. (SPR00090562)

The invalid access is handled now, Test Validation now closes without an error.

Changing the Column Formatting Back to <None> Causes Runtime Error

After changing a column formatting from a specific field formatter back to <none> the following runtime error occurred: "Extraction failed because: A formatter with the name '<none>' does not exist." (SPR00090784)

This problem has been resolved. However, for existing projects with such a problem it is necessary to open the Table Settings window again and to change the column formatting of the affected cell to anything and back to <none> to remove the problem.

Default Property of CscScriptVariable

A script accessing a script variable using the default property did not work anymore. For example: `Project.ScriptVariables.ItemByName("Test")` had to be changed to `Project.ScriptVariables.ItemByName("Test").Value`. (SPR00094329)

The property "Value" is now the default property again.

Automatic Update of Local Fuzzy Database Fails When Executing Database Locator

If a Database Locator used a local fuzzy database, and the automatic update option was enabled, Project Builder failed on extraction if the database file was updated. Error message: "The execution of a locator method failed...". Original error message: "Failed to import file <import-file-path>". (SPR00090997)

Thin Clients Abnormally Terminates

"Attempt to read or write protected memory" and a network-related problem caused Thin Clients to abnormally terminate. (SPR00088677)

This exception is now properly handled and logon operation for Thin Clients users is executed in all cases.

Installer Renamed to Fix Pack

The patch installer used wrong naming conventions. (SPR00088270)

This problem has been resolved by renaming the installer resource string to "Fix Pack."

Thin Clients - Increasing Number of Batches For "Available Batches" Window Breaks Server

When the number of batches to be displayed inside "Available Batches" window was increased to several hundred, the server produced an "unexpected" error and the batch list was not displayed. (SPR00094288)

This issue has been resolved by adding special configuration attributes inside the web.config file to support a larger amount of data to be passed from custom module to Thin Client Server.

Thin Clients - Sorting For "Available Batches" Window Produces Wrong Result

Sorting by ID and Priority Columns inside "Available Batches" window produced wrong results. (SPR00094609)

This problem has been resolved by changing the sorting model for those two columns from "literal strings" to "integer".

Known Issues

The following sections describe known problems, and if available, useful workarounds for Kofax Transformation Modules 5.5 and any later service pack.

Cannot Process Color Images and PDF Documents

If you have Kofax Capture 10.0 installed on a Microsoft Windows 2003 Server or newer operating system and install Kofax Transformation Modules 5.5.0_R2 or a later service pack processing of color images or PDF documents may fail as the runtime library for the Visual C++ VS2005SP1 is not installed correctly (SPR00092650).

Workaround: You need to manually run the installation for those prerequisites, `Kofax Transformation Modules\Prerequisites \vcredist_X86_2005SP1_ATL_Update.exe` from the installation media.

ABBYY FineReader 9.0 OCR Engine

The ABBYY Finereader engine causes an error and does not return any OCR results if both handwriting and Hebrew are selected.

Document Review - VMWare and User Interface Refresh

When hovering over the scroll bar with the mouse, the user interface does not always update correctly and the scroll bar may disappear, when using VMWare virtual machines to run Document Review. (SPR00072876)

Workaround: Although the scroll bar is not visible, it can still be used.

Kofax Capture Features

The following section describes Kofax Capture features that Kofax Transformation Modules 5.5 Service Pack 2 does **not** support.

Partial Batch Export Not Supported for Correction and Thin Clients

You cannot use Partial Batch Export together with Correction and Thin Client modules.

However, all other Kofax Transformation Modules applications correctly support Partial Batch Export. (SPR00085407)

Rotation in Quality Control Terminates Module Abnormally

If a page is manually rotated in Quality Control, and then sent back to Validation or Verification, opening the batch in Batch Manager can cause the module to terminate abnormally. (SPR00072429)

Workaround: Use Validation or Verification to rotate a page.

Project Builder - Exclude Fields from Training

When you add a document to the extraction training set the Edit Document window is displayed. In order to train a field you then select the correct data from the document in the Document Viewer. This stores the OCR value and its position for that field. Kofax recommends to always train all fields for a trainable locator that are available on a document, for example, the order number and the order date fields for the Order Group Locator.

By clearing the check box in front of a field excludes the field from training only if you clear the check boxes for all fields that belong to the same group. This means for the order group fields you must clear the check box for the order number as well as for the order date field. No message is displayed if you haven't cleared all check boxes, instead the field is trained. Note that a field is trained only if both information, value and position on the document, are available. This means in order to exclude a single field from training you can leave the field empty. (SPR00073109)

Thin Client Validation

The following are known problems with Thin Client Validation:

JAWS Screen Reader

It is possible to tab outside of a Thin Client window such as the Open Batch window or the About box and access background controls while the window remains open. This behavior occurs only while JAWS is running. (SPR00064986)

After typing a user name and password, then navigating to and activating the log on button, the JAWS screen reader says that the "log on button unavailable." The user is successfully logged on regardless of this message. (SPR00064987)

Large Batch Performance

Batches with more than 400 documents can experience performance degradation. Users may also experience warnings telling them that the JavaScript is taking a long time and may have stopped. (SPR00088480)

Workaround: Create batches with 400 or fewer documents or allow the JavaScript to continue when a warning is displayed.

Arabic OCR May Cause Project Builder to Abnormally Terminate When Uninstalling Kofax Transformation Modules Service Pack 2

If you have installed the Arabic OCR engine iDRS and then uninstall the Kofax Transformation Modules Service Pack 2 the deinstallation may not be complete and can cause the Project Builder to abnormally terminate. Uninstalling the service pack does not remove two registry keys for the Arabic OCR so that the iDRS engine is still shown in the list of available page and zone recognition profiles. Selecting the engine for a page or zone profile abnormally terminates Project Builder. (SPR00092534, SPR00092535)

Workaround: You need to change the Kofax Transformation Modules installation and remove the Arabic OCR engine by selecting "Entire feature will be unavailable" for "Arabic OCR" from the Custom Setup window. Then uninstall Kofax Transformation Modules Service Pack 2. If you now restart Project Builder the iDRS engine is no longer listed.

Alternatively, if you have uninstalled the Kofax Transformation Modules Service Pack 2 before uninstalling the Arabic OCR, you need to delete the registry keys, `RECOG_ZONE_OCR_IDRS` and `RECOG_Page_OCR_IDRS` on a 64-bit operating system for:

`HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Kofax\Transformation`
`\4.0\Recognizers`

and on a 32-bit operating system for:

`HKEY_LOCAL_MACHINE\SOFTWARE\Kofax\Transformation\4.0\Recognizers`

Uninstalling Kofax Search and Matching Server Service Pack when Installed on 5.5.0_R2

Uninstalling the Kofax Search and Matching Server service pack on a 64-bit operating system that was installed on top of Kofax Search and Matching Server 5.5.0_R2 removes some string values in the registry that are needed if you want to install any later fix pack or service pack.

Workaround: You need to recreate the string values. Then you can install a fix pack or service pack without any problems.

Add the following string values for:

`HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Kofax\SearchMatchingServer`
`\5.5`

- **Patch** - set the value to "2"
- **ServicePack** - set the value to "0"
- **UpdateVersion** - set the value to "Fix Pack 2"

Uninstalling Kofax Search and Matching Server When a Language Pack Is Installed

If you want to uninstall the Kofax Search and Matching Server 5.5 Service Pack 2 from a computer that has one or more Kofax Search and Matching Server language packs installed Kofax highly recommends to uninstall the language packs first and then to uninstall the service pack. In some cases uninstalling the Kofax Search and Matching Server service pack may abnormally terminate with an error (2920).

Workaround: In such a case you have to uninstall the Kofax Search and Matching Server completely and reinstall the version you have used prior to installing Service Pack 2. Note that when uninstalling Kofax Search and Matching Server some settings are lost, for example, the path information for the databases or special settings for registry keys as well as log on settings for the services. That means that you have to set them again after the installation so that you can access existing databases and their configuration.

Wrong Arabic OCR Language Resources

The new Arabic IRIS OCR engine supports only English and German user interface settings in the Project Builder. However, installing a language pack and changing the application language changes the current size for the iDRS Arabic page and zone properties window and the Image Processing options are no longer available. (SPR00092559)

Workaround: Remove the resource files that are included in the installed language pack by deleting `Kofax.PR.IDRS.resources.dll` and `Kofax.ZR.IDRS.resources.dll` from the corresponding language folder, for example:

```
Program Files\Kofax\Transformation\es\Kofax.PR.IDRS.resources.dll
```

After restarting Project Builder the properties window for an Arabic page or zone profile are then displayed in English.

Additional Documentation

The following sections provide additional documentation for new features available in Kofax Transformation Modules 5.5 Service Pack 2, which is not available in existing documentation.

Important Oracle Settings for Relational and Remote Fuzzy Databases

Kofax Transformation Modules supports Oracle databases as database source for relational or remote fuzzy databases. In order to be able to configure an Oracle database as fuzzy database up-front planing for the creation of the Oracle database and the created Oracle users is needed.

The main reason is that Oracle by default only allows the object owner to perform any operations on a table. That means that in case the Kofax Transformation Modules user and the Oracle database owner are not in common the Oracle database can be accessed only if special security privileges are configured and necessary configuration steps are applied.

Otherwise, the Oracle database is not visible when configuring an Oracle database as database source for a fuzzy database in Kofax Transformation - Project Builder or Kofax Search and Matching Server Administration.

The following steps need to be performed:

1 Define the minimum user, respectively role privileges in Oracle.

    a The Oracle user (for example, "ORACLE_USER") that creates the Oracle database must have the following rights assigned to be able to create the database table:

```
CONNECT
RESOURCE
CREATE TABLE
CREATE SESSION
```

    In addition, to make the database visible and configurable in Project Builder and Kofax Search and Matching Server these rights are needed:

```
CREATE VIEWS
CREATE ROLE
CREATE SYNONYM
```

    b The Oracle user (for example, "KTM_USER") that accesses the Oracle database from Kofax Transformation Modules must have the following rights:

```
CONNECT
RESOURCE
EXP_FULL_DATABASE (SELECT ANY TABLE)
```

    Note In case you have various users you can alternatively define a user role (for example, "KTM_ROLE") and assign the above listed rights to the role. A role is a predefined collection of privileges that can be easily assigned to users.

2   Create the Oracle table (for example, "KTM_VENDORS").

```
CREATE TABLE KTM_VENDORS
    (
        NUM              NUMBER           NOT NULL ,
        Firma            VARCHAR2(20)         NULL ,
        STREET           VARCHAR2(30)         NULL ,
        CITY             VARCHAR2(30)         NULL ,
        POSTAL_CODE      VARCHAR2(20)         NULL ,
        CONSTRAINT PK_VENDOR PRIMARY KEY (NUM)
    )
```

and give the KTM_USER or KTM_ROLE access to it.

```
GRANT CREATE ANY INDEX, SELECT ANY TABLE TO KTM_USER;
   GRANT CREATE ANY INDEX, SELECT ANY TABLE TO KTM_ROLE;
```

3   Define a public synonym to the Oracle database table.

```
create public synonym KTM_VENDORS for ORACLE_USER.KTM_VENDORS;
```

Now the KTM_USER or users that have KTM_ROLE assigned can view the database in Oracle.

4   Create a view for the Oracle database and assign it to KTM_USER or KTM_ROLE so that this view can be selected and configured in Kofax Transformation - Project Builder or Kofax Search and Matching Server Administration.

```
CREATE VIEW KTM_VENDORS_VIEW
 AS SELECT * FROM KTM_VENDORS;
```

Apply Batch Filtering

The batches listed in the Open Batches window can be numerous and a somewhat overwhelming to users who only focus on specific batches.

Note Batch filtering is only available if Kofax Transformation Modules is installed with Kofax Capture 10 or a later version.

Batch filtering enables users to remove any unwanted batches from the Open Batch window (for Thin Clients, "Available Batches" window) in order to have a more personalized view of the batches that are going to be processed. This means that users are no longer required to scroll through irrelevant batches that are validated by other users.

Users can add, deactivate filters, remove filters at any time. However, to reduce the number of available batches by applying the configured and selected filters you first have to enable filtering.

Adding Batch Filters

Once batch filtering is enabled, you can add individual filters.

1.   Click Open Batch.

The Open Batches window is displayed.

2.   Click Filter.

The Filter Batches window is displayed.

3.   In the Filter Batches window, click on the Add Criteria button.

A list of available criteria is shown.

4. Select one of the available criteria.

   A new filter is added to the list of filters above. Depending on the type of filter selected, different drop-down lists and fields are available to edit the filter.

5. Edit the filter by selecting values from the available fields.

   For example, if the " Status " criterion is selected, you can set the status to be " Equoteual to " " Suspended ". This means that only suspended batches appear in the list of available batches. Similarly, if you select the " Batch Creation Date/Time " criterion, you can configure it so only batches that are older than five days are displayed.

6. Optionally, add additional filters.

   Note Once a filter type has been added, it is removed from the list. This means that each filter type can only be used once.

   ---

7. Click OK to return to the Available Batches window where any batches that meet the specified filters are displayed.

Deactivating an Individual Filter

1. Click Open Batch.

   The Open Batches window is displayed.

2. Click Filter.

   The Filter Batches window is displayed.

3. Clear the check box for the individual filter you want disabled.

4. Click OK to return to the Open Batches window where any batches that meet the specified filters are displayed.

   The deactivated filter is no longer applied to the list of available batches.

Removing Filter

1. Click Open Batch.

   The Open Batches window is displayed.

2. Click Filter.

   The Filter Batches window is displayed.

3. Select the individual filter type that you want to delete.

   A list of available filter types and actions is displayed.

4. From the drop-down list, select Remove Criteria.

   The individual filter is removed from the list.

   Note If you are troubleshooting your filters and are not sure whether one is needed or not, consider deactivating and testing the result before deletion.

   ---

5. Alternatively, you can delete all filters, by selecting Remove All.

   Click Yes when you are prompted to remove all filters.

Filter Batches Window

Use this window to restrict which batches are displayed in the Open Batch window.

You can filter the batches using the following criteria if available:

- Batch Name
- Status
- Has Error
- Batch Class

Note If this criteria is selected the Batch Classes window is displayed to select one or more batch classes from the list of available batch classes.

- Priority
- Station ID
- Batch Creation Date/Time
- Scan Station ID
- Scan User
- Batch Field

Note This criteria is only available if Kofax Capture 10 is configured to store batches in a Microsoft SQL Server database.

Once a filter is added, several options are available for that filter:

- Users can configure a filter by changing the values in its drop-down lists and fields. For example, by selecting the Filter State from the drop-down list box that can have one of the following values: Contains, Equal to, Not equal to, Greater than, Less than and Starts with and defining a value for the Value column.
- Users can enable or disable a filter by selecting or deselecting its corresponding Use check box.
- Users can remove an individual filter by selecting Remove Criteria from the dropdown list on the filter type. Alternatively, users can remove all filters by selecting Remove All.

In addition to the common buttons, the following buttons are available:

Add Criteria - Select a filter type from the drop-down list of available types to add a filter. Once a filter type is selected, it is removed from the list, which means a filter type can only be added once. All selected filters are combined with the logical AND operation when they generate the list of available batches

Remove Criteria - Click this button to remove the selected filter.

Remove All - Click this button to remove all added filters.

Batch Classes Window

Use this window to select one or more batch classes that are used in the filter criteria to filter the list of batches.

In addition to the common buttons, the following buttons are available:

Add - Adds the selected batch class to the list of Selected batch classes.

Add All - Adds all batch classes to the list of **Selected Classes**.

Remove - Deletes the selected batch class from the list of **Selected Classes**.

Remove All - Deletes all batch class from the list of **Selected Classes**.

iDRS Arabic OCR Engine

The new Arabic OCR engine from I.R.I.S. S.A. replaces the VERUS engine from Novodynamics. Projects that were created with a previous Kofax Transformation Modules version and are using the VERUS engine are automatically updated when the project is loaded for Kofax Transformation Modules 5.5.2. That means that the page and zone profiles are automatically reconfigured to use the new Arabic OCR engine.

Important Kofax highly recommends to check the automatically updated page and zone profiles to improve the recognition results. By default, the automatic update of "Arabic" profiles is configured to use font-independent recognition with "Traditional Arabic" font selected for font-dependent recognition.

The iDRS Arabic OCR engine supports Arabic texts with embedded English and French characters and can be used for page and zone profiles.

For Validation, in order to display a field that contains Arabic text correctly, you need to set the "Right-to-Left" field property to "True" for a validation form field. Then the text is displayed in the correct direction from right-to-left on the validation form.

- iDRS Arabic zone recognition
- iDRS Arabic page recognition

iDRS Arabic Zone Recognition Profile Settings Window

Use this profile to configure zones for the recognition of Arabic text.

Note The Arabic OCR engine must be licensed separately. To install this recognition engine you must run Kofax Transformation Modules setup and select the Arabic OCR option. For more information see the *Kofax Transformation Modules Installation Guide*.

The **General Settings** group has the following option:

Secondary language
Select a secondary language from the drop-down list box if the Arabic text contains latin characters, for example numbers, or English or French text. By default, "None" is selected.

The **Arabic Recognition Environment** group has the following options:

Reliability rate
By default, if no font is selected a font-independent recognition is performed. When a font is selected from the Arabic fonts an additional font-dependent recognition is executed. The reliability rate defines the weight for the font-independent versus the font-dependent results in order to return the result with the best confidence.

Use this option to define the rate for the reliability. You can move the slider to change the default value that is set to 50%. The value is displayed as numeric value in the field on the right side of the slider.

Arabic fonts

If your documents use a special font you can enable font-dependent recognition by selecting the fonts from the list. Kofax recommends to enable multiple fonts only if the fonts used on the documents are known as a random selection can slow down the recognition process and may reduce the accuracy rate. When you enable multiple fonts Kofax recommends to set the reliability rate to 50 so that the font-related and font-independent recognition is rated equally.

The **Image Processing** group has the following options:

Despeckle

Select this option to automatically remove all groups of connected pixels with a number of pixels below the configured Maximum pixel size value. This option is cleared by default.

Maximum pixel size

If Despeckle is selected, you can define a maximum number of connected pixels. Any number of connected pixels below the defined value are removed as noise.

iDRS Arabic Page Recognition Profile Settings Window

The following options are found in the Arabic page recognition properties window.

Note The Arabic OCR engine must be licensed separately. To install this recognition engine you must run Kofax Transformation Modules setup and select the Arabic OCR option. For more information see the *Kofax Transformation Modules Installation Guide*.

The **General Settings** group has the following options:

Word separation characters

Use this field to define the characters that may delimit words. For example, a hyphen (-).

Correct separated numbers

Select this option to automatically combine numbers or groups of numbers that are close together. For example, if the engine reads "12," and "00," as two words less than half a space apart, it returns a single combined word - "12,00". This option is selected by default.

Secondary language

Select a secondary language from the drop-down list box for documents that contain digits or other English or French text in addition to the Arabic text. By default, "None" is selected.

The **Arabic Recognition Environment** group has the following options:

Reliability rate

By default, if no font is selected a font-independent recognition is performed. When a font is selected from the Arabic fonts list an additional font-dependent recognition is executed. The reliability rate defines the weight for the font-independent versus the font-dependent results in order to return the result with the best confidence.

Use this option to define the rate for the reliability. You can move the slider to change the default value that is set to 50%. The value is displayed as numeric value in the field on the right side of the slider.

Arabic fonts

If your documents contain several fonts you can enable font-dependent recognition by selecting different fonts from the list. Kofax recommends to enable multiple fonts only if the fonts used on the documents are known as a random selection can slow down the recognition process and may reduce the accuracy rate. When you enable multiple fonts Kofax recommends to set the reliability rate to 50 so that the font-related and font-independent recognition is rated equally.

The **Image Processing** group has the following options to increase the integrity of images extracted:

Deskew

Select this option to automatically correct slightly slanted images. This option is cleared by default.

Despeckle

Select this option to remove blobs on an image. If selected, it automatically removes all groups of connected pixels with a number of pixels below the configured Maximum pixel size value. This option is cleared by default.

Maximum pixel size

If Despeckle is selected, you can define a maximum number of connected pixels. Any number of connected pixels below the defined value are removed as noise.

Additional Resources

The following section provides additional information such as related documentation, training, and technical support.

Related Documentation

These technical notes are a supplement to the following documentation:

Release Notes

Late-breaking product information is available from the release notes. Read the release notes carefully, as they contain information that may not be included in other Kofax Transformation Modules documentation.

Kofax Transformation Modules Installation Guide

The installation guide provides instructions for installing Kofax Transformation Modules. In addition, it contains information about installation requirements, important installation notes, modifying the installation and uninstalling the product.

Kofax Transformation Modules Thin Client Server Installation Guide

The *Thin Client Server Installation Guide* provides instruction for installing the Thin Client Server. In addition, it contains information for configuring your installation and other system requirements.

Kofax Search and Matching Server Installation Guide

The *Kofax Search and Matching Server Installation Guide* provides instructions for installing the Kofax Search and Matching Server and the Kofax Search and Matching Server

Administration. In addition, it contains information about installation requirements, important installation notes, modifying the installation and uninstalling the product.

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 with Kofax Transformation Modules.

Kofax Transformation Modules User's Guide

The *Kofax Transformation Modules User's Guide* provides information for operators who work with the interactive modules during production.

The guide explains:

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

Kofax Transformation Modules Thin Client User's Guide

This guide provides information for operators who work with the Thin Client modules during production.

The guide explains:

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

Kofax Search and Matching Server Getting Started Guide

The *Kofax Search and Matching Server Getting Started Guide* provides detailed information about the concept and principles of this remote fuzzy database server and how to use Kofax Search and Matching Server Administration for setting up and maintaining fuzzy indexes.

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.

Kofax Transformation Modules Thin Client Web Help

The Kofax Transformation Modules Thin Client Web Help is available by clicking on the Help icon in the Thin Client toolbar.

Important The Thin Client modules are Web based applications. Pressing F1 will launch the Help for the Web browser, and not the Thin Client module.

Help for Scripting

Information about scripting is available from the Help menu of any Project Builder interface that enables you to write or access scripts. Please note that this Help is available in English only.

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.

Technical Assistance for your Kofax Product

Kofax regularly updates the Kofax Support site with the latest information about Kofax products.

To access some resources, you must have a valid Support Agreement with an authorized Kofax Reseller/Partner or with Kofax directly.

Go to site at Kofax Support pages for:

- Access to product knowledge bases.

  Click **CAPTURE: SUPPORT KNOWLEDGE**.
- Access to Kofax Customer Portal (for eligible customers).

  Click **CAPTURE: SUPPORT INTERACTIONS** and log in.

  To optimize your use of the portal, go to the Kofax Customer Portal login page and click the link to open the **Guide to the Kofax Support Portal**. The guide describes how to access the portal, what to do before contacting the support team, how to open a new case or view an open case, and what information to collect before opening a case.
- Product information and release news.

  Click **Product** and select a product name and version.
- Downloadable product documentation.

  Click **Documentation** and select a product name and version.
- Access to support tools.

  Click **Tools** and select the tool to use.
- Information about the support commitment.

  Click **Options** and select Kofax Support Commitment.