

Kofax Transformation Modules

5.5

Release Notes



September 23, 2011

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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.

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

Note Language packs for ten additional languages will be provided for Kofax Transformation Modules that can then be downloaded from the Kofax Support Web pages. Important installation instructions for the language packs are available in the Kofax Transformation Modules Language Pack Technical Notes.

New Features

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

Document Review

The following section contains details about the new features in Document Review.

Custom Error Messages

Users can now provide translations for the error descriptions that are displayed when configurable rules (on batch or document level) are added to a project from Document Review. In the new Translations window, users can edit the message text and provide translations for various project languages.

Toolbar Options

Users can now navigate between pages in a document using new toolbar and menu options for First Page, Previous Page, Next Page, and Last Page.

Zoom Level on Exit

The zoom level user setting is now saved when a user exits Document Review.

Keep Batch Open Option

Users can now prohibit a batch from being closed automatically when the last problem is fixed. This is accomplished by selecting the “Keep batch open (even when all problems are fixed)” option on the Settings window. This ensures that even valid batches are reviewed and closed manually.

General

The following section contains details about new features that are available in various tools and user interactive modules throughout Kofax Transformation Modules.

Color Image Support

Color images can now be classified, separated, and extracted successfully using Kofax Transformation Modules. Color images can also be used in training sets and for generating benchmark metrics.

Several features in Kofax Transformation Modules require a black and white image. A bi-tonal black and white image is generated as needed alongside its corresponding color image.

Empty Field Values for Formatter and Validation Methods

In earlier Kofax Transformation Modules versions, empty fields that have formatting or validation rules applied are always invalid. In Kofax Transformation Modules 5.5, it is now possible to configure Date, Amount, and Percentage formatters, as well as Date, Standard, Invoice, and Regular Expression validation methods to use the “Allow empty field” option. This means that an empty field is no longer always invalid.

Enhanced XDoc Browser Tool

The XDoc Browser has been updated in several ways. There are several new options available on the toolbar to correspond to the existing menu options. There are new main menu items, Recent, Document and Page and corresponding toolbar options to enable quick access to recently opened documents, and to easily navigate within the XDocuments and its pages. Individual window settings and the list of recently loaded XDocuments are now saved for the current user.

Sticky Notes (Annotations) and XValues have been added to the object tree, and the necessary scripting element is displayed for each selected representation. This simplifies writing scripts because clicking the Copy button beside the script element enables users to easily insert the scripting object into a script.

Enhanced Fuzzy Search Algorithm

The fuzzy search algorithm was updated to speed up searching, especially, in large databases and to improve accuracy for search hits that have unimportant, but frequently used words in common. The new algorithm is used for local and [remote fuzzy databases](#).

If you upgrade from an earlier version and have a local fuzzy database configured already, the fuzzy index is automatically upgraded for the new algorithm when the solution integrator imports the fuzzy database once again.

Enhanced Line Item Matching Locator

The new version of the Line Item Matching Locator allows additional purchase order database columns to be returned. A new global column is provided to store the match information that is returned for the comparison of the database with the locator results. For example, to determine whether a match is an under- or over-delivery. In Validation a new function, `Finalize`, is provided to update the matches against the purchase order database.

For Online Learning the `Finalize` function can be used to gather training data during Validation.

The Line Item Matching Locator now supports matching line items for multiple purchase order numbers.

In addition, the Line Item Matching Locator can be used in combination with the [Table Locator](#) so that multiline descriptions and additional information printed on the document can be extracted.

Enhanced Table Locator

Users can now use a Line Item Matching Locator as input for a Table Locator so that line items found by the Line Item Matching Locator are checked against a purchase order

database. The Table Locator can add additional columns that are not supported by the Line Item Matching Locator, such as article code and multiline descriptions.

Kofax Search and Matching Server

The Kofax Search and Matching Server is a new server application that can handle search requests from various Kofax Transformation Modules applications on large volumes of data (for example, customer or supplier databases) located at a remote site.

In contrast to other database servers, such as Microsoft SQL or Oracle server, the Kofax Search and Matching Server allows performing non-exact (fuzzy) searches. This means that search results are returned even if the search string contains spelling mistakes or does not match the exact value that is stored in the database.

Various Kofax Transformation Modules applications can send search requests for one or more fuzzy databases that are maintained on the same server. The Kofax Search and Matching Server handles all search requests most efficiently. For example, it prioritizes search requests from user interactive modules such as Validation, over request from Server to generate results from a Database Locator. Furthermore, database updates can be performed in parallel to the search requests.

A configuration tool, Kofax Search and Matching Server Administration, is provided to set up and maintain fuzzy indexes that are created from a table or view of a Microsoft SQL, Oracle and ODBC database. Automatic updates can be configured for databases that change regularly so that search requests are performed on the most accurate data automatically.

For security reasons, the Kofax Search and Matching Server is considered an Intranet application where all users accessing the server are members of a Microsoft Windows domain. Therefore a secure communication is provided for both database administration and for performing search requests. Alternatively, you can configure the server to run in a local group where the communication for configuring and maintaining fuzzy databases is encrypted, but search requests are performed unsecure, which means not encrypted.

To be able to cope with large enterprise databases of unlimited database size, it is a server application that runs on 64-bit Microsoft Windows server operating systems. It is designed to use multi-threading and support multi-core environment for quick access and fast response time.

Localization

Solution integrators can now localize a project for validation and verifications forms, error messages and Document Review custom menus. During configuration you can define the project languages and provide the translations for those languages, for example, for the error messages, field labels and validation form elements. During design time the project design language can be set so that you can test the added translations for your labels and error messages in Project Builder.

During production the selected application language defines the language for the messages and labels. Alternatively, the language can be set via script. If no translation for an element is available a fall back mechanism is provided. Kofax recommends to use the same language within the complete workflow as otherwise a mixture of different languages for labels and error message occurs.

For each language you can export a localization file so that you can provide the translation by editing the xml file in a single step rather than changing each label or error message separately in different working modes in Project Builder.

PDF Support

PDF documents can now be classified and extracted successfully using Kofax Transformation Modules. Since most PDF documents have built-in text, OCR is not always required.

PDF documents do not support some batch editing operations, and cannot be used to test separation or for separation benchmarking.

Remote Fuzzy Database

In addition to local fuzzy databases, users can now perform non-exact searches on fuzzy indexes that are located at a remote site maintained by the [Kofax Search and Matching Server](#). The Kofax Search and Matching Server can handle search requests from various Kofax Transformation Modules applications on large volumes of data (for example, customer or supplier databases). Existing limitations for local fuzzy databases are resolved as the Kofax Search and Matching Server is a 64-bit application.

Using remote fuzzy databases on client site reduces the startup time as the databases are configured only once and can be accessed from different clients. No extra loading time or memory is needed when accessing data at a remote site. Maintenance costs are reduced for databases that change regularly, as the Kofax Search and Matching Server allows automatic update scheduling so that the client is provided with the most accurate data automatically without needing to manually update the local fuzzy database on each client.

Sticky Notes

Sticky notes can now be added to images to provide notes to subsequent users. For example, if a document has a field that cannot be validated during the first of three validation steps, the user can add a sticky note to the document so the next validation user is able to validate the offending field.

Sticky notes can be viewed and added in the following tools and modules:

- Project Builder - Test Validation
- Project Builder - Test Verification
- Document Review
- Validation and Thin Client Validation
- Verification and Thin Client Verification

Sticky notes can also be viewed, but not edited in the XDoc Browser.

Script events for adding, editing, and deleting sticky notes are also available.

Kofax Capture Supported 9.0 Functionality

The following section contains details about new features that can be used with Kofax Capture 9.0 Service Pack 1 and following service packs.

Document Routing for Folders

When you are using Kofax Transformation Modules 5.5 together with Kofax Capture 9.0 SP1 you can now use Document Routing to route a complete folder with its subfolders and all documents to a new batch.

Document Routing and Assigning a New Batch Class

When you are using Kofax Transformation Modules 5.5 together with Kofax Capture 9.0 SP2 you can now use Document Routing to assign a new batch class to a newly created batch.

Batch Priority

It is now possible to modify the batch priority via script.

Project Builder

The following section describes the new features in Project Builder.

Benchmarking - Classification

Classification benchmarking has been added to perform benchmarking for a set of test documents or a set of training documents. These benchmark results can be saved and compared to other classification benchmark results of the same type after changes are made to the project. These comparisons enable users to determine whether any changes to the classification settings have improved or lowered the classification results.

In cases where documents are marked invalid even when they were correctly classified, users can add benchmark exceptions to provide more accurate statistics.

Benchmarking - Extraction

Users are now able to perform extraction benchmarking with a set of test documents for a single class, a single class and its child classes, or all classes. The test documents are compared against a set of golden files which have been processed to contain the correct extraction information.

Once the extraction benchmark is performed, each document and field results are displayed. Color coding enables users to quickly locate problem documents, fields, and errors.

Users can save an extraction benchmark and compare it to other extraction benchmarks. This enables users to determine if changes to the classification and extraction settings improve or lower the extraction benchmark results.

Benchmarking - Separation

Classification and separation settings can now be tested for a set of pre-sorted test documents or a set of golden files. Any discrepancies between the classification or separation settings and the physical document set structure are highlighted to the user. This enables users to modify their classification and separation settings accordingly.

Configuring Script Resources

In the new Script Resources Window, users can now define and modify script resources that you can refer to from script, such as custom error messages or scripted combo box descriptions. Users can also provide translations for a script resource for the defined project languages using [localization](#).

Conflict Resolution

A conflict is caused when you train a field for documents of the same training set in different ways. For example, if the total amount is located in different positions on documents of the same supplier. You can now resolve conflicts in your training set. The Training

Set (Extraction) panel displays additional columns to list information about conflicted documents and the fields that caused the conflict. For a selected training set document the Resolve Conflicts window can be displayed so that you can easily compare conflicting documents and resolve the conflict by correcting the field values or removing documents from the training set.

Test Documents Panel

The Test Documents panel provides two view modes now, as list or as batch. You can use the new Batch view to choose training documents for classification and extraction and to test classification and extraction as well as to apply batch operations such as batch editing, batch restructuring and batch routing.

You can define additional columns, for example, a document field and sort the documents for the newly-added column.

From the context menu you can now open the test documents folder using Microsoft Windows Explorer or display the XDocument for a selected test document within the XDoc Browser.

Normalizing XDocuments

A new batch operation is provided to normalize test documents that consist of several TIF files in order to combine the different single page TIF files into one multi-page TIF file. You can decide whether the original TIF files remain unchanged in the test document folder or if obsolete files are removed after normalizing the documents. XDocuments that have TXT or PDF source files are not effected.

Test Validation - Displaying Configured Zoom and Docking Settings

Users are now able to display the default validation form settings in Test Validation after changes were made for zooming and docking. For earlier Kofax Transformation Modules all changes were saved permanently. A new option, Save last used zoom and docking settings, is available for the Validation Settings window, which is selected by default, to provide the existing behavior. If this option is cleared, each time a user opens Test Validation, the validation forms are displayed using the default form settings.

Shortcuts for Document Viewer Navigation

Two new shortcuts, F11 and F12, are available to navigate to the next and previous document respectively. This is especially useful when you test the currently configured settings of a locator on different documents.

Validation Form Grid Alignment

When designing a custom validation form, solution integrators can now choose whether or not to snap validation form elements to the grid. A new option in the Tools menu enables turning this feature off and on. "Snap to Grid" is enabled by default.

Validation Form Multiple Selection

Solution integrators can now select multiple validation form elements. The property panel displays all of the common properties between the selected elements, and as long as these properties are editable, any changes made are applied to all selected elements.

Solution integrators can also resize, move, and align multiple selected validation form elements.

Project Merge Tool

This new stand-alone tool enables you to merge two projects. This means that two or more solution integrators can work on copies of the same project simultaneously, then merge the projects at a later time.

Scripts, locators, fields, validation forms, and validation rules can be merged for each class.

Project Planner

The following section contains details about the new features in Project Planner.

New Separation Model Type

The Advanced Feature Classifier can now be used in Project Planner to generate a separation model. This separation model can then be used in Project Builder when configuring trainable document separation.

Recognition Engines and Image Cleanup Methods

The following section contains details about the new features in recognition engines and image cleanup methods.

New Properties for Advanced Despeckle Image Cleanup

In addition to the maximum value for “Mass” and “Proportion” you can now define a minimum value so that solution integrators have more control on blob definitions. This means that this image cleanup method can be applied to a wider variety of use cases.

Mixed Print Page Recognition

Documents that contain both machine printed and hand written text can now be processed by the new Mixed Print page recognition engine. This recognition engine enables different recognition profiles to process different parts of the document, ensuring that the most suitable profile is used for each print type.

RecoStar 5.0 Feature Upgrade

The RecoStar 5.0 service pack 2 recognition engine is now integrated with Kofax Transformation Modules. The new version has multi-language support, allows to define customizable dictionaries and extended regular expressions.

Script Events and Methods

The following section contains details about the new script events and methods:

Database Lookup Events

New script events are available for database lookups, and are executed when the database lookup button is clicked and when the database lookup window is closed.

Reclassify Method

The `Reclassify` method can now be called several times during processing in order to classify a document to a different class and perform the extraction again. Note that to avoid endless loops, the use of the `Reclassify` method is limited; it can be called once per classification step and up to 100 times per extraction step.

In addition, the event has a new optional parameter, *Confidence*, that is used to set the confidence value for the document after reclassification.

Thin Clients

Debug Logging

It is now possible to configure debug logging for the Thin Clients. For more information, see the *Kofax Transformation Modules Thin Client Server Installation Guide*.

Domain Log On

Users can now log on to Thin Client Correction, Thin Client Validation, or Thin Client Verification using their domain name followed by their user name, separated by a backslash character. Kofax Capture allows users to log on to the correct domain user account with the correct privileges, and use Security Boost to get the permissions required to access the file system and make the necessary changes.

This feature requires Kofax Capture 9.0 SP1 or later.

Field Name Localization

You can now localize field names in Thin Client Correction, Thin Client Validation, and Thin Client Verification. This enables you to configure batches to be processed by different operators who specialize in different languages.

Image Cache Configuration

You can now configure the length of time an image is cached in the Web Browser using a new configurable option in the Web.config file. This enables you to address security concerns by shortening the expiration time of cached loaded images.

Rebranding the Thin Clients

It is now possible to rebrand the user interface for the Thin Clients. For more information, see the *Kofax Transformation Modules Thin Client Server Installation Guide*.

Rotate on Disk

The project level flag that specifies whether an image is rotated on disk or in memory is now supported by the Thin Clients.

Single Sign-On

Thin Client Server now supports single sign-on when a Kofax Capture user account is associated with a user's domain account. If the attempt is successful, they will be automatically redirected to the main page, by-passing the log on page.

If a user does not have a Kofax Capture user account associated with their domain account, it is not possible to log on to Kofax Capture automatically. Instead, they must type valid Kofax Capture credentials to log on to any of the Thin Clients.

For detailed information how to set up single sign-on, see *Kofax Transformation Modules Thin Client Server Installation Guide*.

Thin Client Validation

The following section contains details about the new features in Thin Client Validation:

Batch Editing

Users can now edit the batch structure within Thin Client Validation. Users can split, merge, move, and delete documents, pages, and folders. These actions are also supported in the project scripts.

Custom Validation Form Layout

You can now view a customized validation form layout in Thin Client Validation. This enables solution integrators to design a validation form layout that looks the same in both the rich and thin client validation modules.

This includes, but is not limited to custom and localized field labels, MiniViewers, buttons, field behavior, and anchoring.

Disabling Document Rejection

It is now possible to remove the Reject Document option from the toolbar and disable the keyboard shortcut in Thin Client Validation using a Web.config option. For more information, see the *Thin Client Installation Guide*.

Validation

The following section contains details about new features in Validation.

Drop-Down List Boxes for Tables

It is now possible to configure a drop-down list box in a table cell. All drop-down list box features are available in tables.

Microsoft Windows Color Settings for Window Foreground and Background

The configured system settings for the windows foreground and background colors are now used in Validation and are no longer set to white.

Multi-Selection of Form Elements

You can now select multiple elements on the validation form layout tool (on folder and class level) and edit their common properties in a single operation.

Validation Method's Custom Error Message

You can now provide translations for the error description that is displayed when a Regular Expression Validation method is applied. In the new Translations window, you can edit the message text and provide translations for various project languages.

Changes in Behavior

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

Batch.SplitDocumentAfterPage Method

With Kofax Transformation Modules 5.5 a new batch operation method `Batch.SplitDocumentAfterPage` was provided. The internal implementation for this method has now changed as problems caused by the `PageIndex` parameter have been

eliminated. The `PageIndex` parameter that determines the page after which the document is splitted was not implemented as documented. As a workaround scripts using that method had to use `PageIndex + 1`. Due to a changed implementation, solution integrators have to update all scripts for that method using this workaround.

In addition, the documentation for the `Batch.SplitDocumentAfterPage` has been updated for the *Scripting Reference Help* to document its behavior correctly. This means that splitting a document sets the newly-created document to “unclassified” whereas the source document keeps the current classification result and sets the status to “invalid” for both documents.

Documentation

The following changes have been made to the documentation.

System Requirements

The list of supported operating systems, minimum requirements, certified versions of Kofax products and recommended settings are no longer included in the Installation Guide or Release Notes. These settings are now centralized on the Kofax Support Web pages at www.kofax.com.

Document Review

The following changes have been made to the behavior of Document Review.

Localizing Custom Menu and Commands

The Properties window is replaced by the Translations window, where you now can provide translations for the currently selected custom menu or custom command. Additionally to the selected application language, various project languages are available (if added). In the Translations window, a list of available project languages is displayed, which is maintained via the Project Settings - Localization tab.

Installation

Fix Packs and upgrades can now be installed over top of an existing Kofax Transformation Modules installation. Each fix pack or upgrade can be removed in order to restore the previous installed version.

Installations are performed in English only.

The list of supported operating systems, minimum requirements, and recommended settings are no longer included in the Installation Guide. These settings are now centralized on the Kofax Support Web pages at www.kofax.com.

Project Builder

The following changes have been made to the behavior of Project Builder.

Localizing Global Columns Captions

The Global Columns Settings window is replaced by the Translations window, where you now can provide translations for the header caption of the currently selected column. Additionally to the selected application language, various project languages are available (if

added). In the Translations window, a list of available project languages is displayed, which is maintained via the Project Settings - Localization tab.

New Rotation Settings

It is now possible to configure image rotation behavior so the rotated image is stored on disk or in the XDocument. If you store the rotation information in the XDocument, the image is rotated in memory for processing and the original image file is unchanged. If you store the image rotation on disk, the original image is overwritten. This setting is available on the Project Settings - General tab in Project Builder.

The script events related to page rotation are enhanced and provide information about which processing step is performing the page rotation.

Recognition Engines

The following change has been made to the behavior of recognition engines.

RecoStar 5.0

The version of the RecoStar engine has been upgraded to 5.0. As a result, there are some changes in how the properties for this engine behave.

The “Character set” option for content no longer allows regular expressions. As a result, if a project created on a previous version of Kofax Transformation Modules has a value for this field that is not compatible with RecoStar 5.0, an upgrade warning is provided when the project is first opened in Kofax Transformation Modules 5.5. Any regular expressions can be moved to the new “Pattern” option.

If the contents of the “Character set” field are compatible with the new RecoStar version, they are converted automatically.

RecoStar CJK Option Removed

The CJK language option has been removed from the RecoStar page and zone profile settings as the provided RecoStar engine does not support this feature. If you upgrade a project been created with an earlier version of Kofax Transformation Modules that has this option selected in the RecoStar profile settings an upgrade warning is provided.

Synchronization Tool

If you clear Allow batch editing on the Extended Synchronization Settings window - Validation tab no batch editing operations, which includes dragging pages or documents, can be performed. In earlier versions of Kofax Transformation Modules you could drag pages or documents, even if batch editing was not allowed.

Thin Client Validation

The following changes have been made to the behavior of Thin Client Validation.

Batch Loading Performance Improvements

Changes have been made to the Thin Client Server to improve the amount of time it takes for the list of available batches to load in Thin Client Validation. Solution integrators can do this by configuring the number of batches that appear in the Open Batch window.

The length of time it takes a large batch to load in Thin Client Validation has also been improved.

Combo Box Improvements

Combo boxes can now be populated using auto completion.

Remember Layout and Settings

If a user drags the borders between panels, maximizes or minimizes a panel, or switches between horizontal or vertical thumbnails, these changes are remembered and restored the next time the user logs on.

Validation

The following changes have been made to the behavior of Validation.

New Field Label Control Replaces Label Control in Validation Form Layout

In the default validation form layout, the new introduced field label control replaces the label control in previous releases. The new field label is directly linked to the field and shows the display name of the field, which you can define in the field properties. The display name supports the new [project localization](#).

The label control still exists, but now it only offers the opportunity to add free labeling text with localization to the validation form.

When editing projects created in previous releases, you must update existing validation forms to use functionality of the field label controls instead of label controls by replacing the controls in the validation form layout designer. Remember to update your scripts as well.

Resolved Problems

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

Correction

The following problems have been resolved in Correction.

Illegal Characters with the ESCAPE Key

Pressing ESCAPE no longer inserts illegal characters into a correction field on certain operating systems. Now, pressing the ESCAPE key has no effect. (SPR00043016)

N Characters in Whole Field Correction

Fields configured to display Whole Field Correction now correctly switch to this mode when there are N or more unconfident characters. (SPR00056967)

Screen Size Causes Truncated Fields

The entire OCR results are now displayed above a field, and are no longer truncated when the window is not maximized. (SPR00044626, SPR00065744)

Document Review

The following problems have been resolved in Document Review.

Disabled Override Option Available

When the Override option is disabled, users can no longer override documents using the context menu. (SPR00052553)

Drag-and-Drop After Merge to Previous

It is now possible to drag-and-drop pages between documents after a document is merged to its previous document, without restarting the batch. (SPR00088333)

Valid Classification Result and TDS

When the “Valid Classification Result” option is cleared when using Trainable Document Separation (TDS), the correct error message is now displayed. (SPR00052933)

Suggested classes can now be confirmed when the “Valid Classification Result” option is cleared when using TDS. (SPR00052937)

Installation

The following problem has been resolved when installing Kofax Transformation Modules.

Additional Components via Command Line

Additional components such as alternate recognition engines, additional validation steps, and language packs are no longer ignored when installed via the command line. (SPR00070397)

Installing Project Builder

It is now possible to install Project Builder to an existing Kofax Transformation Modules installation using Add/Remove Programs. (SPR00052255)

Uninstall Error Message

If a batch is in-progress when Kofax Transformation Modules is uninstalled, a descriptive error message is now displayed. (SPR00047635)

Installation Problems For KofaxTransformationModules-5.5.0.ISO and KofaxTransformationModules-5.5.0.1 Fix Pack

The KofaxTransformationModules-5.5.0_R2.ISO allows installing Kofax Transformation Modules for a Kofax Capture client installation on a Microsoft Windows XP SP3 operating system without any problems. (SPR00091161)

In addition, Kofax Transformation Modules - Thin Client Server can be installed for Kofax Capture 10 without the need of changing a registry key and the Kofax Search and Matching Server can be installed on a computer that has Microsoft SQL Server 2008 R2 already available. (SPR00093667, SPR00090192)

Invoice Add-on Pack

The following problem has been resolved in the Invoice Add-on Pack.

Tab Sequence Order

The tab order now behaves as expected and in the correct order on the “Line Items/Amounts” tab. (SPR00065639)

Kofax Capture Integration

Arabic Batch Class Names

Batch classes containing one or more Kofax Transformation modules can now have names that contain Arabic characters. (SPR00052361)

Publishing Kofax Capture Batch Classes

Warnings are now provided if one or more unexpected modules are present in a batch class queue, or when an expected module is missing. (SPR00044444, SPR00044761)

Synchronizing a Project

An error message is now displayed if the Extended Synchronization Settings window is opened before a project has been synchronized. (SPR0006587)

Project Builder

The following problems have been resolved in Project Builder.

Adaptive Feature Classification

Training is now skipped for classes with a single word only, as this can cause memory issues. (SPR00053807)

Amount Formatter Negative Amounts

The following negative amounts are now supported by the Amount Formatter:

- ### CR
- ### credit
- (###)
- ###-
- -###

These supported formats are not case sensitive. (SPR00052841)

Configuring Dictionary Import Settings

Toggling the "Ignore Case" option when configuring a dictionary no longer increases the size of the initial dictionary column. (SPR00031357)

Database Locator Exclusions

Adding a database that contains records that should not be found by the Database Locator no longer fails to find valid results. (SPR00069455)

Date Formatting OCR Misreads

Dates containing common OCR misreads such as "O" misread as "0" are now recognized as valid dates. (SPR00065632)

DateValue Property Handles Dates Before 1970

The `DateValue` property of `CscXDocField`, `CsCXDocTableCell` and `CscXFolderField` could not handle dates before 1970. Now the internal date type was changed to `DATE` that can handle dates from 1 January 100 – 31 December 9999. `DATE` does not support Julian dates. The Gregorian calendar is assumed to extend back in time to 1 January 100.

This issue has been resolved now. (SPR00044297)

Deleting Multiple Regions

The cursor or selection focus is no longer lost after deleting multiple regions in the locator properties windows for the Bar Code Locator, Classification Locator, and the Database Locator. (SPR00025835)

Designing a Custom Validation Form

Common properties across multiple selected form elements can now be configured successfully. (SPR00032411)

A database lookup button can no longer be mapped to table fields. This caused undesired behavior that is no longer possible. (SPR00070858)

When a validation form contains many fields, scrolling within the validation form no longer causes items on the form to shift unexpectedly. (SPR00065895)

Selecting the “No separator” option no longer adds an unwanted horizontal line to the validation form. (SPR00065908)

Setting the “Horizontal Tab” property to “False” is now retained when saving a project or closing the validation form. (SPR00065644)

Hiding a table column on the validation form is now retained when saving a project or closing the validation form (SPR00083327)

Setting the “Tab Details” value to “True” on a custom validation form no longer causes slowness when navigating between fields during Validation. (SPR00082902)

It is now possible to delete a customized validation form for an Invoice project template class. (SPR00071914)

Document Review Batch Rules

An error is no longer encountered if a batch rule is added without selecting a script method. Instead, a window prompts the user to select a script method. (SPR00071587)

Empty OCR Results Error

Blank pages where no words are found during OCR no longer generate an error that OCR needs to be performed again. (SPR00066969)

Importing Classification Instructions

It is no longer possible to import classification instructions that do not use the .ins extension. As a result, an error message is no longer displayed. (SPR00031817)

Importing TDS Models

Importing TDS models into a project when the class names match but have different cases no longer corrupts a project. (SPR00072554)

Line Item Matching Locator Testing

The test result highlighting no longer confuses the active table cell with other cells in the table. Only the active cell is highlighted. (SPR00052193)

A message box rather than an error is now displayed when a user attempts to test a Line Item Matching Locator for a document that has no OCR results. (SPR00072041)

The net and gross columns in

Moving Trained Classification Images

Moving a child class containing trained classification images to a different parent class no longer loses the training samples. (SPR00087048)

Regular Expressions

Multiple consecutive space characters are now normalized into a single space character in order to improve regular expression results. (SPR00029239)

Enabling the “Ignore Case” option no longer evaluates negated character classes such as `\S`, `\D`, or `\W` incorrectly. (SPR00086972)

Relation Evaluator Locators

It is no longer possible to select a Table Locator or a Line Item Matching Locator when configuring a Relation Evaluator. This ensures that no errors are encountered when a batch is processed. (SPR00051595)

Reserved Windows Filenames and Classes

It is no longer possible to create a class and name it using one of the reserved Windows filenames. The list of reserved file names in Windows operating systems includes `aux`, `con`, `clock$`, `nul`, `prn`, `com[1-9]`, and `lpt[1-9]`. (SPR00031349)

Result Matrix CPU Usage

Hovering the mouse pointer over the Result Matrix no longer occupies 100% of the CPU. (SPR00066230)

Script Editor Tab Width

Changes made to the tab width within the Script Editor window are now saved when exiting Project Builder. (SPR00064945)

Script Locator and Relation Evaluator Order

It is now possible to add a Relation Evaluator after a Script Locator without generating an error. (SPR00065186)

Table Field Property Inheritance

When a parent class has the “Allow empty tables” option enabled for a table field, this option is now inherited by all child classes, unless overridden. (SPR00084172)

Test Documents Located on Network Drive

An error message is no longer displayed when the network drive that contains test documents used in a project is unavailable when closing a project. (SPR00065863)

Test Document Sorting

It is now possible to sort test documents by their confidence level, in either ascending or descending order. (SPR00033173)

Test Validation and Scripting

The `BeforeRotatePage` and `AfterRotatePage` scripting events are now executing during Test Validation. (SPR00069083, SPR00069620)

Server

The following problems have been resolved in Server.

A2iA Zone on Last Page of Document

A zone can now be added to the last page of a document using the A2iA locator method without returning an error. (SPR00071605)

Advanced Zones on Poor Quality Documents

With the upgrade to RecoStar 5.0, an error message is no longer displayed when and Advanced Zone Locator encounters a zone on a poor quality document. (SPR00046507, SPR00065638, SPR00057460)

Batch Separated Flag Inheritance

When a child batch is created during batch separation, the child batch inherits the "Batch Separated" flag from its parent batch. (SPR00069844)

Database Evaluator Extraction Confidence

The confidence of a Database Evaluator is now accurately displayed, even when all locators used to evaluate the data, match the database. (SPR00049669)

Extraction Reread Confidence

If a field is enabled to perform a reread, the returned value no longer uses the initial extraction confidence, instead, it uses the reread confidence level. (SPR00036276)

Failure to Recognize Manual Anchors

The recognition rate for manual anchors has been significantly improved by modifying the algorithm responsible for recognizing anchors. (SPR00068501)

Index Field Deletion

Document index fields that are not mapped to Kofax Transformation Modules fields when a project is synchronized, now retain any values assigned previously. (SPR00085712)

Invoice Group Locator Returns Incorrect Value

When two closely related different values with the same format appear on the same line, the Invoice Group Locator can now be trained to select the desired value rather than always the first value on the left. (SPR00065730)

Line Item Matching Results

For line items that have a discounted unit price (total price) the Line Item Matching Locator no longer mixes up the discounted and not discounted unit and total price values. Now the unit price (total price) column always contains the discounted total price (unit price). (SPR00070765)

The tax amount is now correctly calculated when a Line Item Matching Locator is processed. (SPR00070767)

Locator Result Lists for Database Fields

An error is no longer generated if a database lookup requires a result list from another locator to extract a field value. (SPR00050512)

RecoStar Recognition Engine

The email address character “@” and other special characters are now recognized successfully for all languages supported by the RecoStar 5.0 recognition engine. (SPR00054110, SPR00057554)

Rotating Images in Production

Images are no longer virtually rotated in the XDoc when TDS is performed. (SPR00069836)

If selected, the “Rotation during runtime” OCR option is now honored when OCR is performed. (SPR00064716)

When rotation is disabled, images are no longer being rotated randomly. (SPR00070540)

Server Scheduler Service

The Server Scheduler Service will no longer fail to start if the Windows Event Log is full. In the event of a full log, no logging is performed. (SPR00087804)

It is no longer possible to save changes made to the Server Scheduler Service if the “This account” field is left empty. Instead, a prompt asks for a user account. (SPR00031583)

Table Fields Populated via Script

Table fields can now be modified successfully using a validation script during production. (SPR00052311)

Statistics Viewer

The following problems have been resolved in Statistics Viewer.

Recognition Accuracy Grouped Report

The limits on the start and end dates have changed and it is now possible to set the start and end dates at plus or minus five years from the current date. (SPR00071260)

Duplicated Report Conditions

Additional report conditions are no longer duplicated when a database is reopened several times. (SPR00071800)

Synchronization Tool

The following problems have been resolved in the Synchronization Tool.

Menu and Context Menu Items

The “Unassign Form Type” context menu and Edit menu options are no longer available when there is no assigned form type. (SPR00029791)

The “Load Project,” “Add a new Document Class,” and “Add Form Type” menu options are no longer available when the Synchronize tab is selected after the Classes tab, because these options cannot be used in this tab sequence. (SPR00031841)

Thin Clients

The following problems have been resolved in each of the Thin Clients.

Session Expiration

When a session times out due to inactivity, the active batch is now suspended. (SPR00072370)

Thin Client Correction

The following problems have been resolved in Thin Client Correction.

Closing a Batch

A batch that is processed by another user module immediately after Thin Client Correction no longer marks every document containing one or more corrected field as invalid. Instead, Thin Client Correction performs validation on all corrected documents when the batch is closed. (SPR00085198)

Updating Kofax Capture Fields

Kofax Capture fields are now updated with the corrected values entered during Thin Client Correction. (SPR00071427)

Thin Client Validation

The following problems have been resolved in Thin Client Validation.

Child Class Manual Classification

If a document cannot be manually classified as a child class, the validation fields for the child class are no longer missing. (SPR00086235)

Cleared Tables via Script

When a table is cleared via scripting, the table is now displayed correctly, and subsequent actions are no longer causing errors. (SPR00083755)

Rejecting Moved Pages

It is now possible to reject a page after it is moved to a new document. (SPR00087039)

Scripted Combo Boxes

If a combo box is populated by a script, users can now manually enter a value into the field as free content. (SPR00085396)

Validation

The following problems have been resolved in Validation.

Large Table Performance

The performance of large table interpolation has been improved. (SPR00069345)

The performance when validating field in large tables has been improved. (SPR00069361)

Rejecting Pages

When multiple pages in a document are rejected, the rejection notes and rejected flag are now consistently displayed in Quality Control for all rejected pages. (SPR00085367, SPR00070460)

When multiple pages in a document are rejected, unrejecting one of those pages in Quality Control no longer removes the rejection flag for other rejected pages. (SPR00085446)

Relational Database Performance

The performance of projects that use relational databases for validation has been improved. (SPR00087087)

Script Events

Script events are now executed successfully for each parent and child class as expected. (SPR00087108)

XDoc Browser

The following problem has been resolved in the XDoc Browser.

Document Information

Locator and field data is now displayed consistently for each XDocument. (SPR00054795)

Known Problems

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

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

The following are known problems with 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.

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)

Kofax Capture Features

The following sections describe Kofax Capture features that Kofax Transformation Modules 5.5 does **not** support.

Rotation in Quality Control Crashes Modules

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 crash. (SPR00072429)

Workaround: Use Validation or Verification to rotate a page.

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.

Thin Client Validation Section 508 Compliance

Section 508, an amendment to the US Workforce Rehabilitation Act, mandates all electronic software that is IT developed, procured, maintained, or used by the federal government be accessible to people with disabilities.

Kofax Transformation Modules - Thin Client Validation is a Rich Internet Application (RIA) that makes extensive use of Ajax and other scripting libraries for an enhanced user experience. While the application cannot claim full compliance to all Section 508 checkpoints, it is largely accessible due to the significant advancements in accessibility support through traditional remediation techniques and limited ARIA tags.

Tip Users of assistive screen reader technology will want to use a recent version that includes support for ARIA tags.

Support for Section 508 compliance is limited to the Internet Explorer 8 Web browser, with the following exceptions:

- Table data, such as Invoice line items, is not supported.
- Editing a batch by moving pages within a document or between documents is not supported.

Known Problems in Thin Client Validation for Section 508 Compliance

The following are known problems with Thin Client Validation Section 508 Compliance:

Focus on the Available Batches Window

It is possible for the Available Batches window to lose focus, so screen readers are unable to navigate through the batches without the operator pressing TAB several times to find the window. (SPR00065280)

Workaround: Enable the Open next batch automatically and the Include suspended batches options, on the Available Batches window.

Screen Reader Incorrectly Reads Lists

Some screen readers incorrectly say that drop-down lists have zero items. They then proceed to read out the items in the list. (SPR00065209)

Workaround: Ignore the list total and wait to hear the list items.

Screen Reader Shortcut Key Conflicts

Some screen readers use shortcut keys for various functions. These can conflict with the shortcut keys used in Thin Client Validation, leaving users unable to use certain Thin Client Validation functionality. For example, check boxes cannot be confirmed with the ENTER key as expected. (SPR00064985)

Workaround: Modify the screen reader shortcut keys. For example, in JAWS, disable the default application settings.

Screen Reader Tab Focus on Windows

When a screen reader is running and reading a window such as the About window, it is possible to SHIFT+TAB out of the window and access the background controls. (SPR00064986)

Workaround: Do not use SHIFT+TAB to navigate away from an open window.

Screen Reader Problems with Internet Explorer

Message and window titles are not read. (SPR00064989)

Validation field names are read to the user twice. (SPR00064990)

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:

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

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 with your Kofax product.

For more information about your product, visit the [Kofax Support pages](#) for:

- Product information and release news
 - Access to the Kofax Knowledgebase
 - Access to the online Web Incident Management Systems 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