

Kofax Transformation Modules

4.5

Release Notes



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Contents

- Introduction 4
- New Features 4
 - Invoice Evaluator 4
 - Line Item Matching Locator 4
 - Vendor Locator 4
 - Additions to Existing Locators 4
 - Certified Generic Knowledge Bases and Additional Languages 5
 - Database Connections 5
 - Thin Clients 5
 - Document Review 6
 - Recognition Engines 6
 - Miscellaneous 6
- Changes in Behavior 7
 - Project Builder 7
 - A2iA Zone Locator Installation 8
 - Generic Knowledge Bases 8
- Resolved Problems 8
 - Document Review 8
 - Knowledge Base Administration 8
 - Knowledge Base Learning Server 8
 - Kofax Capture Integration 9
 - Project Builder 9
 - Server 11
 - Validation 12
 - Verification 12
- Known Problems 13
 - Arabic OCR Engine 13
 - Correction 13
 - Installation 14
 - Kofax Capture 8 Features 14
 - OCR Engines 14
 - Project Builder 14
 - Project Planner 15
 - Statistics Viewer 16
 - Synchronization Tool 16
 - Thin Clients 16
 - Validation 17
- Additional Resources 17
 - Related Documentation 17
 - Training 18
 - Assistance for Your Kofax Product 18

Introduction

This set of release notes contains important information not included in other Kofax Transformation Modules documentation. Please read these release notes carefully before you install, upgrade, or use this product.

New Features

The following new features have been added to Kofax Transformation Modules 4.5.

Invoice Evaluator

You can use this evaluator to compare index field data commonly used in invoice projects based on the results of up to three other input locators. For example, common input locators include the trainable group locator, a rules-based invoice header locator, and a format locator.

The Invoice Evaluator compares the results of the input locators without relying on scripts to analyze the results. This evaluator provides a standard evaluation from raw single results.

Line Item Matching Locator

The Line Item Matching Locator uses processed documents along with information from your back-end enterprise resource planning system, to extract and match line items on an invoice or invoice-related document. You can improve extraction by comparing and matching invoice items with purchase order information.

Vendor Locator

This locator combines results from a variety of sources, including other locators, evaluators, and databases, to detect vendor data like an address, to determine the vendor ID, which is stored in a database. This enables you to apply special rules against VAT ID or bank details, which were not available when using only a fuzzy database comparison, to help identify the vendor.

Additions to Existing Locators

The following section contains details about new functionality that is available for existing locators.

Manual Anchoring in the Advanced Zone Locator

Manual anchoring provides better results in forms processing, especially for forms with a background that may cause zones to be registered incorrectly with automatic registration. With manual anchoring, you can explicitly specify which structural feature on a form is used to perform registration. You can also assign different anchors to different zones on the same page.

For complex forms like questionnaires with many check boxes, you can also set text anchors that read the text inside a specific region and perform registration based on the stored character position.

Standard Evaluator and Tables

You can now evaluate tables using the standard evaluator. If you select a locator that returns table results (for example, a table locator or a line item matching locator), you must evaluate it against another locator that returns table results.

Weak Keyword Dictionary for Group Locators

The Amount Group Locator, Invoice Group Locator, Order Group Locator, and Trainable Group Locator now enable you to define weak keyword dictionaries to improve the generic algorithm for extraction training.

For projects that were created with an earlier version of Kofax Transformation Modules and have training sets that use the generic algorithm, Kofax recommends that you add a weak keyword dictionary to the group locators that use the “generic” or “both” training type and retrain the project.

Certified Generic Knowledge Bases and Additional Languages

The generic algorithm for extraction training has been improved and the Generic Knowledge Bases have been recreated using this improved algorithm.

Generic Knowledge Bases are available for German, English US, English UK, French, and Spanish and are certified for the use with Kofax Transformation Modules.

With Kofax Transformation Modules 4.5 the certified Generic Knowledge Bases are included in the Sample Invoice Projects installer.

Database Connections

The following section contains details about new database connections and new functionality for database connections in Validation.

Database Configuration Wizard and Relational Database Support

You can now add relational databases such as Microsoft SQL Server, Oracle, and ODBC databases to a project.

You can manually add a relational database to a project, or you can use the new Database Configuration Wizard. This wizard guides you through the necessary steps to add a relational database to your project.

Database Lookups on a Validation Form

You can now add a button to a validation form that performs a database lookup and populates fields during Validation. This functionality required scripting in earlier releases. You can configure this button in Project Builder.

Thin Clients

The following section contains details about the Thin Clients.

Thin Client Validation

This module enables enterprise or smaller installations to have documents validated at remote locations via the Internet or an Intranet. Documents structure and data can be reviewed after automatic classification and extraction.

This can be done inside or outside the main installation network, it does not require any software to be installed on the remote workstation, as only a Web-browser is needed. This new module also requires no intermediate proprietary software for enabling connections, including LAN or WAN connections.

Thin Client Verification

This module enables enterprise or smaller installations to have documents verified at remote locations via the Internet or an Intranet. Extracted fields can be double-checked before they are released to increase accuracy.

This can be done inside or outside the main installation network, it does not require any software to be installed on the remote workstation, as only a Web-browser is needed. This new module also requires no intermediate proprietary software for enabling connections, including LAN or WAN connections.

Document Review

The following section contains details about new features for Document Review.

Single Key Confirmation

You can now confirm a document class using a shortcut key if the suggested class is the actual class.

Improved Keyboard Navigation

You can now use key and arrow key presses to navigate between documents.

Expand or Collapse All Documents

Users can now expand or collapse all documents in a batch using new toolbar options or keyboard shortcuts.

This enables you to quickly maximize or minimize the batch content and ensure that the batch structure is correct.

Overriding Invalid Fields

You can now override discrepancies so that a document is valid in Document Review.

Recognition Engines

The following section contains details about new recognition engines delivered with Kofax Transformation Modules 4.5.

ABBYY Finereader 9.0

Kofax Transformation Modules 4.5 provides ABBYY Finereader 9.0, supporting Chinese, Japanese, Korean (CJK), and other languages.

Asian languages can be displayed only when these language options are installed on your Windows operating system.

Important There are some limitations for the recognition of handwritten data for special languages. For more details refer to the ABBYY Finereader documentation.

Arabic OCR

Arabic OCR is an additional recognition engine that recognizes Arabic characters on documents processed by Kofax Transformation Modules. This engine is available in the Kofax Transformation Modules setup and requires a separate hardware key and license.

Miscellaneous

The following section contains details about new features available in Project Builder.

Amount Formatter Negative Values

You can now include negative values when configuring an Amount Formatter. Any projects created in an earlier version of Kofax Transformation Modules must leave this option disabled to ensure compatibility. (SPR00028527)

Country Settings

You can now define country-specific tax models, tax rates, and rounding settings for amounts. You can use these when creating a new invoice project and for invoice header locators, invoice group locators, and invoice validations.

Script Variables

You can now define your own set of variables to be used in scripts. The variable values are saved in an external XML file next to the project file so that you can easily edit variable content using a text editor, such as Notepad.

Training a Project

You can now train a project specifically for extraction or classification using the modified Train Project button on the main toolbar. When you update the classification settings in a project, this feature enables you to train for classification only, which takes much less time than training for both classification and extraction.

Changes in Behavior

The following changes have been made to the behavior of Kofax Transformation Modules 4.5.

Project Builder

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

Amount Group Locator

You can now use an apostrophe (') as a decimal symbol. (SPR00052112)

Automatic Table Extraction

Automatic table extraction now allows only a format locator without subfields to find all amounts on a document. (SPR00042064)

Database Configuration

You can now add a Microsoft SQL Server, Oracle, or ODBC database to a project using a Database Wizard and new database configuration windows.

Relation Evaluator Settings

Change to the Relation Evaluator geometric settings now enable you to specify whether two alternatives are expected to appear on the same line, improving extraction results. (SPR00037642)

Tax Rate Selection

You can now define one or more country tax rates in the Project Settings - Country Settings tab. If your project uses the VAT tax model, you can add one or more of the defined tax rates when you create an invoice project or add an amount group locator, an invoice header locator, and an invoice validation rule.

Test Validation Viewer

Any changes that you make to the Viewer window layout in Test Validation are now saved until the next time you use it.

A2iA Zone Locator Installation

The A2iA Zone Locator is now part of the Kofax Transformation Modules 4.5 setup. To install the A2iA Zone Locator, remember to select “Check and Recursive Recognition” in the Add-ons folder.

Generic Knowledge Bases

In earlier versions of Kofax Transformation Modules, Generic Knowledge Bases were included as part of the main installation. With Kofax Transformation Modules 4.5, you must install the Sample Invoice Projects that include all certified Generic Knowledge Bases. To use Generic Knowledge Bases in a production environment, you need the Invoice Add-on license.

If you upgrade from an earlier version of Kofax Transformation Modules, Kofax recommends that you use only the new certified Generic Knowledge Bases and, if necessary, update existing projects.

Resolved Problems

The following problems have been resolved in Kofax Transformation Modules 4.5.

Document Review

The following problems have been resolved in Document Review.

Rejection Note Help

Pressing F1 while the Rejection Note window is open now launches Help for that window. (SPR00043008)

Split Document Script Event

The Split Document script event (AfterSplitDocument) now assigns the new class to the new document. (SPR00044510)

Knowledge Base Administration

The following problems have been resolved in Knowledge Base Administration.

Generate Activation Code Error

The error message window that is displayed when you try to create an activation code without providing a knowledge base password or license hardware key serial number now has a descriptive title. (SPR00047435)

Opening Recent Projects

Opening a recent project once its training folder is renamed or deleted no longer causes the module to abnormally terminate. Instead, an error message is displayed. (SPR00041278)

Toolbar Repositioning

You can no longer drag the main menu outside of the Knowledge Base Administration module window. (SPR00043991)

Knowledge Base Learning Server

The following problems have been resolved in Knowledge Base Learning Server.

Batch Processing

You can now successfully process a batch through Knowledge Base Learning Server a second time, after it has been sent to Quality Control with an error. (SPR00045225)

Knowledge Base Learning Server no longer abnormally terminates when processing a skewed image. (SPR00046097)

Script Locator Handling

You can now use script locators in a Standard Evaluator without causing an error. (SPR00049222 and SPR00048298)

Trainable Group Locator with Multiple Fields

Knowledge bases become no longer corrupted when a document that has already been trained is marked for online learning. (SPR00048092)

Kofax Capture Integration

The following problems with the integration with Kofax Capture have been resolved .

Batch Class Export with Open Project

You can now export a batch class while the original project is open in Project Builder. (SPR00037704)

Batch Custom Storage Strings

Batch custom storage strings that are created during Kofax Transformation Modules server processing and deleted in Kofax Capture are no longer recreated when the batch is reopened in Kofax Transformation Modules. (SPR00047945)

No License Available Error Message

A descriptive error is now displayed when no license is available. (SPR00047938)

Project Builder

The following problems have been resolved in Project Builder.

Advanced Zone Locator - Field Mapping

If multiple subfields are mapped to a single field using the All option, all subfield values are now correctly extracted and displayed in the field. (SPR00038869)

Advanced Zone Locator - OMR Group Zone Recognition Profile

You can no longer apply an OCR profile as a recognition profile to an OMR group zone. (SPR00033498)

Amount Formatter Decimal Places

You can now configure an Amount Formatter to allow two decimal places. For example, 34.55. (SPR00030501)

Amount Group Locator

You can now resize the Amount Group Locator properties window after adding keyword rows to the Document Type tab without causing alignment issues. (SPR00044292)

Database Evaluator Error with Format Locator

An error message is no longer displayed when you use a Database Evaluator with a Format Locator. (SPR00033349)

Date Formatter with a Dictionary

A Date Formatter with a dictionary now works for the YYYY_MM_DD format. (SPR00037548)

End-of-Table Dictionary

In a Table Locator, if you select an end-of-table dictionary and then disable the “Use a dictionary to find the end of the table” option, the dictionary is now ignored. (SPR00039569)

Extraction Design

You can now rearrange fields in a project with many fields in Extraction Design without causing Project Builder to abnormally terminate. (SPR00046032 and SPR00046425)

Extraction Training

You can now delete files that have been modified in extraction training without causing an error. (SPR00047641)

Using the toolbar option to delete a document in the Edit Document window no longer closes the window. (SPR00048263)

Format Locator Dictionary Error

Project Builder no longer abnormally terminates when a dictionary that is configured to use a space as a delimiter is added to a Format Locator. (SPR00036710)

Image Cleanup Profile Viewer

The cleanup profile settings are now accurately displayed after you save a profile. (SPR00046892)

Importing Invalid Fuzzy Database Files

You can no longer import invalid files as a fuzzy database. Only .txt and .csv files are supported. (SPR00029409)

Invisible Table Columns

Table columns set to invisible are no longer displayed when you add them to the validation form, making it easier to configure table properties such as column width. (SPR00039089)

Manual Confirmation with Default Value

Fields with the “Require manual field confirmation” option set along with a default value are no longer assumed valid. (SPR00034723)

Merged Copy Document Creation

You no longer receive an error if a document is created from merged copies of a document. (SPR00034131)

OCR Substitution

You can now modify existing OCR substitution strings. (SPR00049279)

Percentage Formatter Error

The Percentage Formatter no longer displays a confusing error message when you enter an incorrect value. (SPR00035765)

Project Portability

It is now easier to move a project from one server to another because imported elements such as dictionaries and databases can have relative paths.

If databases and dictionaries are saved in the same folder as the project file or in a subfolder of the project path then you do not have to modify the path for dictionaries and databases manually after you have copied the project file to another computer. (SPR00029521)

Script Validation Methods

You can now successfully use a script validation method to compare automatic table sums with a document's total value. (SPR00049219)

Table Fields - Reread Options

Reread settings for a table field are now saved as expected. (SPR00036964)

Table Fields - Column Settings

Column Formatting for a table field is now saved as expected. (SPR00036963)

Test Validation

If you dock the viewer to the bottom of the Test Validation window and reopen it, the Test Validation window no longer goes blank, and behaves as expected. (SPR00037457)

Test Validation now remembers its layout when you exit that window. (SPR00045549, SPR00043671, SPR00043668)

Training Documents

An error is no longer generated, and Project Builder no longer abnormally terminates if you use a split document for training. (SPR00032302)

You can now train locator fields that are inherited from a parent class. (SPR00046349)

Training no longer abnormally terminates if you add a document that is missing OCR text to the training set. (SPR00048028, SPR00046097)

Trainable Document Separation Project Warnings

Project Builder no longer abnormally terminates if you ignore a warning about an error with the Trainable Document Separation (TDS) model. Instead, TDS is deactivated until you correct the problem. (SPR00044657)

Validation Form Design

The correct label properties are now displayed when you select the label for a table field. (SPR00042395)

Server

The following problems have been resolved in Server.

Table Locator Extraction

If a table cell contains strings separated by a lot of white space, all of the cell data is now extracted. (SPR00045479, SPR00045528, SPR00049284)

Validation

The following problems have been resolved in Validation.

Always Capital Option

The Always Capital option no longer causes text that is manually entered to appear in reverse. (SPR00041043)

Closing a Validation Batch

It is now possible to close an erroneous batch in Validation. (SPR00041052)

Field Data in Validation

Field data from a drop-down list box from a previous document no longer passes to the current document in a batch when running in Validation. (SPR00044201)

Locked Batches

An error message is now displayed when you attempt to open a locked batch in Validation from Kofax Capture Batch Manager. (SPR00036915)

Validation Script Events

The ValidationForm_TableCellGotFocus script event now is called when you navigate to a table cell. (SPR00042312)

The ValidationPanel_FolderLoaded script event is now fired when an operator switches between documents in different folders in Validation. (SPR00036910)

The ValidationForm_TableCellGotFocus script event is now fired in Validation. (SPR00042312)

The AfterComboboxItemSelected script event no longer contains a default value when the event is fired in Validation. (SPR00049041)

You can now type a value into a field defined as “Combobox” display style that is recognized by a scripted validation method that is triggered by pValItem.Text. (SPR00049818)

Validation Status Bar

The Validation status bar no longer causes problems with wrapped text. (SPR00038502)

Validation Tabs

Invalid fields can now be identified correctly in documents with tabs. (SPR00046521)

Validation Tables

An error no longer occurs when you validate a table in Validation. (SPR00049847)

Validation no longer displays tables created in an earlier version of Kofax Transformation Modules disproportionately. (SPR00037277)

Verification

The following problems have been resolved in Verification.

Batch Class Publishing

A warning is no longer displayed when you publish a batch class that includes the Verification module. (SPR00047509)

Field Values

Changes to field values are now saved in Verification. (SPR00045076)

Known Problems

The following sections describe known problems, and if available, useful workarounds for Kofax Transformation Modules 4.5.

Arabic OCR Engine

The following are known issues with the Arabic OCR engine.

Arabic OCR Engine Licensing

The Arabic OCR license does not support 64-bit operating systems. (SPR00052287)

Workaround: Use a 32-bit operating system.

Character Mode Correction

You cannot use Arabic OCR or other right-to-left languages for fields set to character mode in Correction.

Workaround: Use confirmation mode in Correction.

Export Batch Class

You cannot export a Kofax Capture batch class that has Arabic characters in its name and that has been synchronized with a Kofax Transformation Modules project. (SPR00052361)

Workaround: If you need to export a batch class, use Latin characters for the batch class name.

Regular Expression and Arabic Text

You cannot use regular expressions to locate Arabic text, nor can you use Arabic characters in a regular expression. (SPR00052047, SPR00052023, SPR00050245)

Workaround: Use locator methods other than format locators to find data.

Text Direction

If there is English or other left-to-right text on a document, it is displayed right-to-left. (SPR00051986, SPR00052022, SPR00052018)

Correction

The following is a known issue with Correction.

Advanced Zone Error

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

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

Installation

The following are known issues with Kofax Transformation Modules installation.

Crystal Reports Installation

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

Workaround: Use the executable installer to initially install Kofax Transformation Modules and Crystal Reports. If you see an error after Kofax Transformation Modules has been installed using the .msi file, install Crystal Reports manually.

Installing Project Builder

You cannot install Project Builder on a computer that already has other Kofax Transformation Modules components installed. (SPR00052255)

Workaround: Ensure that you install Project Builder when you install Kofax Transformation Modules first.

Installing Project Planner

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

Kofax Capture 8 Features

The following sections describe Kofax Capture 8 features that Kofax Transformation Modules 4.5 does **not** support.

Copy and Paste

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

Kofax Capture Network Server and Online Learning

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

OCR Engines

The following are known issues with OCR Engines.

RecoStar Asian Language Support

Even though the RecoStar profile window provides an entry for reading Asian languages, it does not support Asian languages. (SPR00039195)

Workaround: Use the Finereader engine to read Asian languages.

Project Builder

The following are known issues with Project Builder.

64-Bit ODBC DSN Database Connections

Project Builder does not recognize ODBC System DSN connections on a 64-bit operating system. (SPR00051973)

Workaround: Use the 32-bit ODBC Administrator tool in %windir%\SysWOW64\odbcad32.exe.

Non-ASCII Characters in Trainable Document Separation Class Names

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

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

Unsupported Database Data Types

If you configure a database connection that contains any of the following unsupported data types, the data is unavailable to the user:

- **Microsoft SQL Server**

Binary, Image, SQLvariant, Uniqueidentifier, Varbinary, Varbinarymax, Timestamp, DateTimeOffset7, Geography, Geometry, HierarchyID, Time7, Microsoft SQL Server System CLR Types

- **Microsoft Access**

OLE Object

- **Oracle**

BFILE, BLOB, INTERVALDAY, INTERVALYEAR, RAW, TIMESTAMP, UROWID

(SPR00051982)

Workaround: Use other supported data types.

Validation Form Design

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

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

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

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

Selecting an editable option such as Name and pressing Delete after closing either the Field Mappings or Visible Fields windows, deletes the entire button, and not just the parameter contents. (SPR00051971, SPR00050078)

Workaround: Edit all button settings before mapping fields or selecting which fields are visible.

Project Planner

The following are known issues with Project Planner.

Help Unavailable After You Use Import Feature

Project Planner Help does not launch after you use the Import feature. (SPR00044396)

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

Image Viewer Toolbar Missing

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

Workaround: Either restart the computer after the installation of Kofax Transformation Modules and before you start Project Planner. Or, if you have started Project Planner already, close the application and restart it.

Non-ASCII Project Names

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

Workaround: Use only ASCII characters when naming a project.

Projects in Compressed Folders

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

Workaround: Create and save projects only in non-compressed folders.

Statistics Viewer

The following is a known issue with Statistics Viewer.

Database Selection

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

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

Synchronization Tool

The following is a known issue with the Synchronization tool.

Adding Index Fields

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

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

Thin Clients

The following are known issues with the Thin Clients.

Opening Large Batches

Loading a batch containing more than 800 documents may cause a script time-out error implying that a script has failed to run properly. (SPR00051763)

If you see this time-out error, do not stop the script. The batch opens once all of the documents have been loaded.

Validation

The following are known issues with Validation.

Tab Sequence Duplications

When you ungroup fields on the Validation Form Layout window, the tab order can contain duplicates, causing problems when you tab through the validation form.

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

Table Column Default Sizes

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

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

Validation Time-out

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

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

Additional Resources

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

Related Documentation

These release notes are a supplement to the following documentation:

Installation Guide for Kofax Transformation Modules

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

Kofax Transformation Modules Configuration Guide

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

Kofax Transformation Modules User's Guide

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

The guide explains:

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

Help

Kofax Transformation Modules Help is available from the application components as follows:

- From any of the Kofax Transformation Modules components, press F1, click Help from the toolbar, or select Contents from the Help menu.
- From any application window, press F1 or click Help to display context-sensitive Help information for the window.

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.

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.

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 at www.kofax.com 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