

Kofax AP Agility

Release Notes

Version: 2.4.1

Date: 2021-04-22

The KOFAX logo is displayed in a bold, blue, sans-serif font. The letters are thick and closely spaced, with a consistent weight throughout. The 'K' and 'F' are particularly prominent due to their size and the sharp angles of their strokes.

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Chapter 1

About this release

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

Version information

Kofax AP Agility 2.4.1 has the following build number.

2.4.1.0.0.1605.

System requirements

Software requirements for Kofax AP Agility are listed in the Technical Specifications document on the [Kofax AP Agility hosted site](#). The document is updated regularly, and we recommend that you review it carefully before installing your product.

New features

Kofax AP Agility 2.4.1 has the following new feature.

Online learning for line items

Online learning for line items is now supported. This means that when a user corrects a line item during the Validation Activity, users can flag the document so that it is used for online learning. Once a few samples for the same vendor are collected, extraction for that vendor should improve.

Changes in behavior

There are no changes in behavior in Kofax AP Agility 2.4.1.

Chapter 2

Upgrade Kofax AP Agility

For non-cloud-based installations, you can upgrade Kofax AP Agility to version 2.4.1 by following the installation instructions in the *Kofax AP Agility Installation Guide* for 2.4.0.

For cloud-based installations, you can upgrade Kofax AP Agility to version 2.4.1 by following the installation instructions in the *Kofax AP Agility On-Premise for Cloud Solutions Installation Guide*.

Chapter 3

Resolved issues

This chapter describes issues that are resolved in Kofax AP Agility 2.4.1.

Issues resolved in the Invoice Processing functionality

The following issues were resolved in the Invoice Processing functionality of Kofax AP Agility.

SAP ECC line pairing issues

1596253: Line pairing no longer pairs to GR lines when fully invoiced.

Invoice value issues in the Line Pairing Correction Activity

1596244: Invoice values are no longer rounded and decimal values are retained.

Company code aggregation

1617366: Company codes are now aggregated correctly, independent of the size of the vendor data set.

Cropped Chinese documents

1592386: If a Chinese document is cropped it no longer results in a suspended job. The job is processed as expected.

Out-of-scope VAT rates

1591882: Tax rates for lines are no adjusted as expected.

Issues resolved in the AP Agility Workflow functionality

The following issues were resolved in the AP Agility workflow functionality of Kofax AP Agility.

Changes possible when not allowed

1591817: It is no longer possible to apply changes to invoice lines during the Comment Request Activity and the Hold Activity.

Chapter 4

Known issues

This chapter lists issues that you may encounter while using Kofax AP Agility 2.4.1. Workarounds are provided when applicable.

Analytics for AP Agility export error

1591806: You may encounter an error after a list of invoices is exported to Excel.

Workaround: Install the Kofax Insight 6.3.0.1 Fix Pack that will be available in the next couple of months.

Analytics for AP Agility reports not refreshing correctly

1582568: If a report is opened in Analytics for AP Agility for more than 5 minutes and it refreshes itself automatically, the graphs or bars and any associated data is lost.

Workaround: Open the report again by navigating to the home screen and then back to the report.

Auto rotate and Thai documents

1362741: When auto-rotate is enabled in the Image Enhancement Settings, either on the Scan form/File Import, or the Scan/VRS profile, some Thai document are turned upside down.

Workaround: In the VRS profile, disable the "IPAgility with VRS" setting. This turns off auto-rotate and should eliminate flipped documents.

Changes possible when not expected

1591817: It is possible to make changes to an invoice during the Comment Request Activity and the Hold Activity, where changes should not be allowed.

Deprecated support for QuickInvoiceEntry to PeopleSoft

1584968: It is not possible to export to PeopleSoft using the QuickInvoiceEntry method.

Workaround: Export to PeopleSoft using the staging tables instead.

E2B Telecom invoice limitation

891134: E2B invoices that use the telecom format have multiple items for each line item. However, the generated image contains information about the first instance only. This is also true when the document is displayed in the Validation Activity and the PIX Correction Activity.

Line Pairing Correction Activity setting documented in English only

The Discount setting that appears on the Line Pairing Correction Activity form is documented in the English *Help for the Line Pairing Correction Activity*. only. The setting itself is translated in all supported languages.

Workaround: If you need more information about this setting, refer to the English *Help for the Line Pairing Correction Activity*.

Incorrect button reference

1591781: The documentation for the Initialize Connection to Invoice Portal window references a non-existent Disconnect button.

Workaround: There is no button to disconnect from Invoice Portal. Ignore the entry in the documentation.

Rounding errors when splitting a line

1513252: When a line has a Line Total with an odd value after the decimal point and then that line is split, the resulting line totals do not add up to the original line total due rounding issues.

Workaround: Do not split lines that have an odd value after the decimal point.

Two Kofax AP Agility installations after upgrade

1612620: After upgrading Kofax AP Agility from version 2.4.0 to 2.4.1, there are two entries for Kofax AP Agility in the Windows Programs and Features window.

Workaround: Create and then execute a new file called `APAgility.reg` that has the following contents:

Tip Ensure that there is no white space in the following registry string.

```
Windows Registry Editor Version 5.00
```



```
[-HKEY_LOCAL_MACHINE\SOFTWARE\WOW6432Node\Microsoft\Windows\CurrentVersion\Uninstall  
\{34643f38-93e4-49ef-9a30-be06209a8a95}]
```

It is necessary to remove the following folder from the package cache because it contains the Kofax AP Agility 2.4.0 installation and is no longer required.

```
C:\ProgramData\Package Cache\{34643f38-93e4-49ef-9a30-be06209a8a95}
```

Unit of Measure tab mistakenly displayed in Azure

1369467: If you are using Kofax AP Agility in an Azure environment and you are using a version of Kofax TotalAgility that is earlier than 7.8.0, the **Settings > Invoice Processing > Capture Profiles > Unit of Measure Settings > Unit of Measure Settings** tab is displayed in error, although its contents are hidden.

Zoom-levels and default settings

When the default zoom-level is used, some setting values appear as a hyphen (-) character when in fact, they are a tilde (~).

Workaround: Increase the zoom level of your Browser to 110% or higher in order to see the correct tilde character.

Chapter 5

Additional documentation


The following changes will be made to the *Help for Kofax AP Agility Configuration* in the next full release of the product.

- **New** indicates a brand new topic that has not appeared in previous versions.
- **Updated** indicates that additions, deletions, and edits exist that do not appear in previous versions.

Refer to the [Kofax AP Agility 2.4.0 documentation](#) as needed.

New: Trainable line items

Online learning for line items is enabled by default. This means that no configuration is required to enable online learning.

However, training documents are not collected automatically like they are when a change is made to one of the trainable header fields. Instead, if a user wants to ensure that a change that they make to the line items that is trained, the user has to press the **Mark for Online Learning**  toolbar setting in the Validation Activity. When a document is added to the training documents, it is for that specific vendor only.

Kofax AP Agility knows what vendors have training documents for line items. For these vendors, the results from the trainable locator are given priority over the default generic extraction results. The next time an invoice from that vendor is processed, the existing training data is usually used and the extraction results should improve.

Kofax AP Agility may still decide to use the generic extraction results if the results from the trainable locator are not as good as the generic extraction. This decision is based on a cross-check against header amounts.

Invoices from other vendors using the same layout do not use online learning unless there are training documents for those vendors.

Tip If you do not want to use online learning for any vendor, clear the Enable training setting in the Lineltems locator in the Kofax AP Agility Transformation Designer project.

Updated: Email Templates

What has changed: *The table of email replacement tags has been updated to remove the [InvoiceURL] tag because this tag is not supported for email templates.*

You can maintain a list of different email templates for each business unit. These templates are available to users when processing invoices via the Send Email button in the action bar of the Coding Activity, the Approval Activity, the Exception Activity, and the Line Pairing Exception Activity.

This enables you to create a set of templates with relevant information for each business unit, and for users to select these templates when they need to send an email about an invoice.

You can use the following tags in the subject and email body. These tags match the corresponding invoice fields and must be within square brackets.

Tag	Invoice field and description
[InvoiceNumber]	Invoice number
[InvoiceDate]	Invoice date in the DD/MM/YYYY format
[VendorName]	Name of the vendor
[Total]	Invoice total amount
[DueDate]	Invoice due date
[DiscountDueDate]	Discount due date

You can maintain email templates by performing the following steps.

- Create an Email Template for a business unit
- Edit an email template for a business unit
- Delete an email template from a business unit