

Kofax TotalAgility

Release Notes

Version: 7.8.0

Date: 2021-03-25

The logo for KOFAX, consisting of the word "KOFAX" in a bold, blue, sans-serif font.

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Chapter 1

About this release

The release notes give you information about TotalAgility 7.8.0 R2. Please read this document carefully, as it may contain information not included in other product documentation.

Version information

The version and build number for this Kofax TotalAgility product is 7.8.0.0.R2.610.

The original version and build number for Kofax TotalAgility 7.8.0 was 7.8.0.0.0.377.

To verify the build number, launch the TotalAgility Designer and navigate to **System > System settings**.

The version information is available at the bottom right corner of the **System settings** page. The last three digits correspond to the build number.

Content changes

This section lists changes made to the Kofax TotalAgility 7.8.0 release notes document since it was initially published.

Revision	Date of change	Description
Kofax TotalAgility 7.8.0 R2	March 23, 2021	Added the following item to the "New features" chapter: Updates to installation guides Added the following items to the "Resolved issues" chapter: <ul style="list-style-type: none">• 1603741• 1602413• 1598608 Added the following item to the "Known issues" chapter. 1603998

Access TotalAgility documentation

You can access Kofax TotalAgility documentation online as well as in offline mode.

Online documentation

The product documentation for Kofax TotalAgility 7.8.0 is available at the following location:

<https://docshield.kofax.com/Portal/Products/KTA/7.8.0-dpm5ap0jk8/KTA.htm>

To launch the online help for the installed version of the product, click the Help icon from the application.

Note

- When upgrading to TotalAgility 7.8.0 from an earlier version, ensure that the check box for "Import system Workspace package" is selected to view the Workspace help online; otherwise, you must import the WorkspaceHeader form from the TotalAgility Workspace package upon upgrading TotalAgility.

Offline documentation

To access the documentation offline, you can download it from the [Kofax Fulfillment Site](#). For each language, a separate documentation package is available to download as a compressed file, such as KofaxTotalAgilityDocumentation7.8.0_EN.zip for English or KofaxTotalAgilityDocumentation7.8.0_FR.zip for French.

The English .zip file includes both help and print folders. The print folder contains all guides, such as the installation guide and administrator's guide. The .zip files for other languages contain only the localized files as applicable.

The following procedure describes accessing TotalAgility documentation offline for English.

1. From the Kofax Fulfillment Site, download the documentation.zip file for English.

2. Extract the contents of the compressed documentation file and do the following:

Note In a distributed environment, perform copying files on the Web server, and the Web.config changes on the Application and Web servers.

- Copy the contents from TotalAgility_help\EN folder to:
\\TotalAgility\Agility.Server.Web\Help\TotalAgility_designer
- Copy the contents from KTAW_EN folder to:
\\TotalAgility\Agility.Server.Web\Help
- Copy the contents from KTAWCC_EN folder to:
\\TotalAgility\Agility.Server.Web\Help
- Copy the contents from ProjectBuilder\EN (Transformation Designer) folder to:
<%ProgramFiles%>\Kofax\Transformation\Help\en_US\
- Copy the contents from TotalAgility_opmt_help\EN folder to:
\\TotalAgility\Agility.Server.Web.TenantManagement\TenantManagement\Help
- Copy the contents from TotalAgility_quickcapture\EN folder to:
\\TotalAgility\Agility.Server.Web\Help\QuickCapture

Note The Quick Capture folder is not available by default. Create the "QuickCapture" folder within the Help folder and then copy the contents into the folder.

- Copy the contents from TotalAgility_KEC_help\EN folder to:
\\TotalAgility\Agility.Server.Web\Help\ExportConnector_help
- Copy the contents from the activity (such as CEBPM_scanclient_help\EN) folder within ThinClientServer folder to:
\\TotalAgility\Agility.Server.Web\Forms\Controls\Capture\Help
- Copy the contents from KFS_adminconsoleTA\EN (Devices help) to:
\\TotalAgility\Agility.Server.Web\bin\Administrative\Help
- Copy the contents from TotalAgility_repositorybrowser_help\EN to:
\\TotalAgility\Agility.Server.Web\Help\TotalAgility_repositorybrowser
- Copy the contents from the SDK_Documentation folder to:
\\TotalAgility\Agility.Server.Web\Help\API
- Copy the contents from TotalAgility_documentconverterhelp\EN folder to:
\\Kofax\Document Converter\web\en\WebHelp
- Copy the contents from KIC_mchelp\EN folder to:
\\Kofax\KIC-ED\MC\web\en\WebHelp

3. Navigate to the installation folder and do the following:

- For TotalAgility help and Devices help:

- a. Open TotalAgility Web.config in a text editor from the following location:

\\TotalAgility\Agility.Server.Web

- b. Locate the <appSettings> section and remove `http://docshield.kofax.com/KTA` from the key value: `<add key="OnlineHelpURL" value="http://docshield.kofax.com/KTA"/>`.

Alternatively, run the Configuration Utility (available from the Installation media at \\TotalAgility\Utilities\ConfigurationUtility) and remove the URL for online help from the OnlinehelpURL setting.

- For Kofax Export Connector help:

- a. Open Agility.Server.ExportConnector.exe.config in a text editor from the following location:

\\TotalAgility\Agility.Server.Web\bin

- b. Locate the <appSettings> section and remove `http://docshield.kofax.com/KTA` from the key value: `<add key="OnlineHelpURL" value="http://docshield.kofax.com/KTA"/>`.

- For Message Connector help:

- a. Open configuration.xml in a text editor from the following location:

\\Kofax\KIC-ED\MC\web

- b. Locate the <OnlineHelp>1</OnlineHelp> section and replace 1 with 0.

- For Document Converter help:

- a. Open configuration.xml in a text editor from the following location:

\\Kofax\Document Converter\web

- b. Locate the <OnlineHelp>1</OnlineHelp> section and replace 1 with 0.

4. Save and close the configuration file.

Clicking the Help icon will launch the help for the installed product.

Chapter 2

New features

This chapter describes the features and enhancements included in TotalAgility 7.8.0 and related components such as Transformation Designer and Message Connector.

Kofax TotalAgility

This section describes the new and enhanced features in TotalAgility.

Updates to installation guides

The "Upgrade databases manually" section of the *Kofax TotalAgility Installation Guide* and *Kofax TotalAgility On-Premise Multi-Tenant Installation Guide* is updated with the following information:

To upgrade the TotalAgility databases manually to version 7.8.0, you must run a special Migration Utility to complete the database upgrade. Please contact Kofax Technical Support to request a copy of the Migration Utility and the appropriate instructions to complete a manual database upgrade.

Additionally, the "Upgrade TotalAgility in silent mode" section in both guides is newly updated with information about precheck updates for capture data migration.

Quick Capture

Quick Capture is a new design environment that enables business users to create capture solutions easily without the need for training. The business user can upload and train sample documents, extract data and design the workflow that should be used to process them. The workflow can include document review, validation, verification, re-scan and making the documents available for download. Capture solutions once published are accessible from within the Workspace enabling the user to start scanning easily.

The Quick Capture solution includes some TotalAgility items that are accessible directly from the Designer, so they can easily be extended to support more complex functionality.

The Quick Capture Designer is available within the Start menu when you install Kofax TotalAgility 7.8.0 or upgrade to Kofax TotalAgility On-Premise 7.8.0. When you install Kofax TotalAgility in an on-premise multi-tenant or Azure environment and create a tenant, a link to Quick Capture Designer is provided in the email if the tenant has access to the TotalAgility Designer.

Installation

The following installation features are available in TotalAgility.

Cloud storage for capture data

By default, the binary data such as capture documents, .NET Store DLLs and KCM packs are stored in the TotalAgility database. You can use the preconfigured external cloud data storage services such as Amazon S3 or Windows Azure Blob Storage for saving and processing the binary data. The cloud services help to reduce the SQL Server maintenance costs, delegate maintenance to external services and to provide encryption. Once the cloud storage is enabled, you cannot disable it later.

Test database connection

When installing TotalAgility, if you choose to use an existing database, a new option, Test connections is available to test the database connections and ensure the database connection is valid. An error is reported if the databases are not available.

Upgrade of TotalAgility databases

For TotalAgility on-premise and on-premise multi-tenant installations, the Upgrade Databases option is available in the TotalAgility installer that upgrades all the databases to the latest version of TotalAgility when TotalAgility is not installed locally. The upgrade option is supported only for databases created with TotalAgility 7.4.0 or later.

Express installation

For a TotalAgility on-premise installation using the standard installer wizard, a new installation type, **Express installation**, is available where TotalAgility can be installed with all default settings that need minimal user interaction. The express mode installs Combined Web Application server, SQL Express and Transformation Server. You can configure the license server while installing TotalAgility or post installation. Because of the limitations of the Express installation, we recommend that you do not use this installation type in a production environment.

Installer options for NLP language bundles

When using Docker containers to deploy TotalAgility, the Transformation Server container is very large because of the engines installed, notably the NLP components. As a result, the total image size may be nearly 40 GB. To reduce the size of the installed product (on disk), the following installer options are added in silent installation configuration files for NLP language bundles in both the on premise and on-premise multi-tenant installations:

- **NlpWestern**: Installs the Natural Language Processing language bundle for English, Spanish, Portuguese, French, and German.
- **NlpWesternExtended**: Installs the Natural Language Processing language bundle for Italian, Romanian, and Dutch.
- **NlpExtended**: Installs the Natural Language Processing language bundle for Japanese, Chinese, and Korean.

Capture InPlace Editor

The InPlace Editor is a panel in Validation Client that allows fields and image snippets to rotate through the panel, instead of moving the focus around the document form. This is useful in scenarios where you want to keep the physical focus location stationary onscreen.

Custom services

A new business process type, **Custom services**, is available under Workflow menu that enables you to provide custom logic that can be made available for use within a process, business rule, case definition or form. A Custom service only supports automatic activities; it does not support manual activities.

You can create custom service groups that can be used within custom services. You can add web service references and server variables from within a custom service group and save them to a category.

The new activity, **Custom service**, can be used in a business process, case definition, custom service, and business rule.

The new action, **Custom service**, can be used in a form control such as button and text box.

Complex variable node

A new node type, **Complex variable**, is added to easily manipulate the contents of a complex variable. You can add, delete, and get rows and update cell values within rows.

You can use the complex variable node within queries. When you create or modify a System query in the Designer or Workspace, the complex variable node is available in the Activity type filter. When the query is executed, the correct data is returned as defined.

You can update the type of the column while configuring the complex variable. If you change the type, all the cell values within that column are discarded so that you can provide the value depending on the type.

Tile control

The **Tile** control displays the total returned from a query in a compact way to display this information on a dashboard. You can include an image on a tile control and have more control over the content.

Tagging

You can tag items and easily find items that have a specific tag. For example, a process may contain a tag representing an integration or all the items used within a solution can contain a tag with the solution name.

Localization to Japanese

The TotalAgility design environment is now localized for Japanese, including all user interfaces, online help, and documentation.

Installation programs and configuration editor will be localized in a future release.

Exclusions:

- API Reference Systems (generated from source code)
- Kofax MFP Administrator Guides (by vendor)
- KC/KTM Converter tool and guide
- Diagnostic messages for support reasons (stack trace, debug logs, and more)

- Visio Add-in
- Outlook Add-In
- SharePoint Web Pages

APIs

The following new APIs are added.

Complex variable helper APIs for forms

Complex variable helper JobService APIs are available for forms. Using these APIs, you can get and update complex variables by mapping them to tables in forms.

Export folder or document API

This API is available on SDK CaptureDocumentService. You can call this API to automatically prepare the files as per the export within Quick Capture and download the files to disk.

Get Machines and their type/status API

This documented API returns a list of all machines on the system, including the machine ID, machine name, service type and active/inactive status.

For on-premise multi-tenant, the API runs from an activity running on the Integration Server.

Form batch actions

When deploying form actions, TotalAgility batches multiple sequential form actions that execute on the server into single HTTP requests to provide the best possible performance. Each batch of actions in an HTTP request will execute on the server before returning results to the client browser. Using client-side form actions intermixed within a sequence of server-side form actions could cause a batch of actions to be split if a client-side form action is placed in the middle of a set of server-side form actions. This will result in multiple HTTP requests, one for each batch of server-side form actions.

Web Capture Service: Backward compatibility

The older versions of Web Capture Service (WCS) can be used with the newer version of Scan Client without forcing the user to update WCS. This applies only up to the most recent service pack level release. The older versions of WCS is useful in scenarios where the WCS deployment is large and may take weeks or even months to complete. You can avoid the high cost involved by ensuring all workstations are updated to the correct version of WCS at the same time. When using the older versions of WCS, no new feature or bug fix introduced in the newer versions of WCS will work.

.NET SDK function to execute Online Learning system task

A new .NET SDK function is available, which when used in form actions, executes the Online Learning system task immediately. This way, a person demonstrating TotalAgility can explicitly execute Online Learning and does not have to wait for the system task to occur.

General enhancements

Quick Creation: Milestone trigger process

A new link, **Create a new process**, allows you to quickly create a process that is used as an exception process when creating a process, milestone trigger and process trigger.

When configuring an exception either at process, trigger or system level you can now easily create the exception process clicking the newly added link. The process will be created with the correct parameters and will be automatically selected for use.

When configuring a field formatter you can easily create the correctly configured business rule by clicking the newly added link reducing the amount of effort required.

Show associated items

Associations are extended throughout the product to enable you to easily identify the items that impact other items.

You can view associations for processes, forms, resources, personas, extraction groups, classification groups, resources, skins, document/folder types, profiles (Scan/VRS, Separation, PDF, and Document conversion), queries, formatters, server variables, global variables, navigation menus, custom services and integrations.

The business rule association is enhanced to view the business rule associations for the following: extraction groups (used as document type validation and field validation), folders (used as folder type validation and field validation), field formatters, forms and form templates.

Standard escape functionality on all dialog boxes

The standard escape functionality is available on all dialog boxes in TotalAgility Designer. You can press the **Esc** key to close the current dialog box while designing forms. A prompt is displayed to save the changes.

Copy option for navigation, lookup and regular expressions

You can create a copy of a navigation menu, lookup and regular expressions using the **Copy** option on the context menu.

Generalized export warning

A warning is displayed when enabling Generalized export so that you do not turn it accidentally. You can proceed only when you confirm selection.

Capture fuzzy search enhancements

Search configuration enhancements

The search configuration options are enhanced for fuzzy search to improve user efficiency. The enhanced options include:

- The fuzzy search field is pre-populated with an index field value.
- The fuzzy search can be limited to specific columns.
- After opening the fuzzy search pop-up, the focus is on the search field.

When configuring the "Fuzzy lookup" form action, you can assign a form control, variable, or manual input value to use as the default search string in the "Fuzzy lookup" pop-up window.

Define column width

You can customize the column width of the pop-up window when launching a fuzzy search. This improves user efficiency as columns can be sized appropriately to show the expected content, instead of resizing them manually each time.

You can define the overall pop-up window width and height in pixels or by percentage and define the column width of each table column in pixels or by percentage.

Configure displayed column

In the Designer, you can provide a user-friendly name for the column headers. This improves user efficiency to ensure only the required column are displayed, and in the most logical order.

Information message for the user during and after search

A visual feedback or alert message is available to indicate that the search is in progress or has occurred and returned no results.

Debugging enhancements

Process debugging: Enhanced usability

You can debug your process without having unnecessary prompts to confirm the **Restart here** and **Restart next** actions. Additionally, the state, milestone and events toolbar buttons are disabled if there are none configured.

Process debugging: View job history

A new option, **Show Job History**, is available when debugging a process which when clicked displays the history of the job and helps you determine how the process arrived at its current state.

Form debugging: Define actions to be skipped

When you debug a form, you can skip an action within your form execution. For example, you may skip the action if it is connecting to an external system that is not configured in your system or if it may incur a cost to execute it. The status of skipped actions is updated as **Skipped** in the stack trace.

Query enhancements

Improved security in queries

An **Access control** tab is added in Designer for Job list, Work queue and System queries. You can provide permissions to groups or individual resources to run, view, edit or delete a query. You can share queries with specific users or groups.

When you upgrade from a previous version, if a query does not have any resources listed, the owner of the query is provided the full control.

Extended date search capabilities in queries

You can generate queries where the search criteria for date fields within a work type is not relying on a specific date to be entered by using the new option **@Today** and **@Today(+)(-)** days.

The same option is available for Work queue, Job list and Workload controls.

Machine name in System queries

In TotalAgility Designer, you can see the machine name in System query, if the **Completed work** option is enabled in the Workload control. This can be used to identify bottlenecks or underperforming machines.

When you define a system query to search for completed work on "All machines" or a specific machine and use the GroupBy or Custom sort order API or use the query on a chart and group by machine name, the query displays the machine names at runtime as defined.

This option is not supported for TotalAgility in an Azure or on-premise multi-tenant environment. When you execute this query in these environments, the machine name is hardcoded to TotalAgility.

Permit select or deselect all columns during query creation

You can quickly select or deselect all columns when creating a query. For example, you may want all except two columns, so it is quicker to select all and deselect those two instead of individually selecting each column. To display all columns at runtime, a **Show** check box is available on the column header.

Option to show queries in a tree or drop-down

Users can select queries from a drop-down or tree and have the properties rearranged. On an upgrade, the drop-down is selected by default.

Support for @Today in a date variable

In business processes, business rules, skins, and forms, you can set a date variable value to use **@Today** to get the current date or a past/future date by adding or subtracting days. For example, you can set a variable to **@Today-7**.

On form load, or when you create a job on a process, or use a rule that has a variable using **@Today**, the value of the variable is set to the current date +/- number of days specified, and the time segment is set to 00:00:00.

Filtering and sorting process or rule variables

You can sort and filter the variables defined in a process or a business rule by ID, Type, Initialization, Input or Output.

Expression node enhancements

Additional functions

- Abs(number) to calculate the absolute value of a number
- Round(number, number) to round to (two or zero or three and so on) decimal places
- Pow(number, number) to calculate a number raised to the specified power
- MinutesDifference(Date, Date) to get the number of minutes between two date/time values
- URLEncode(string)

Resizing editor box

When configuring an expression, you can resize the editor box by dragging the handle available in the bottom right.

Testing an expression in a process

A **Test** button is available in an Expression activity to test an expression to ensure the results and format are as expected.

Pools and lanes

You can visually represent processes and participants and an area in a process using pools and lanes. You can add lanes to the pool, delete lanes in the pool, or resize and reorder lanes.

Skin list page enhancements

You can view the different versions of the skin using the context menu of the skin. Additionally, you can view the associated template, last modified by and last modified date on the Skin list page. You can also view the version history as per the process on the **File** tab.

Nested lists: Child items show parent name in tooltip

The child items now show the parent name as part of the tooltip when you search on nested list pages for case definitions, fragments, field zoom settings, and form, document and activity variants. The name in the tooltip helps you determine the correct item you are looking for especially if there are many items with the same name.

Allow more than one action to be moved within an event

You can move multiple actions within an event using Ctrl+click. This is especially useful when moving the action between Begin and Else conditions.

Chart control enhancements

Support for expand to fit

If the **Expand to fit** property is enabled for a form, then this property is available on the chart control. You can set a chart to expand to fit so that a form uses the full screen.

If an upgraded form has **Expand to fit** enabled and contains a chart control in the last row, then this new property is set to false.

Drill-down

An **Events** tab is added to the Chart control, which when clicked redirects you to another form that provides more details about the chart.

Workload control: Extend actions available

When configuring a Workload control in a form, the **Take Activity**, **Complete Activity** and **Reassign** options are available. You can turn these options on or off.

When you view the workload control at runtime, these options are available depending on the setting for manual activities. When you upgrade, these settings are turned off by default.

Update control properties action

An **Update control properties** action is available to set properties of a control to dynamically change the display or behavior of the control. This action only applies to Tile, Work queue, Workload and Job list. On selecting the control, the respective properties are available for update.

Note This action is not available for touch-enabled Phone and Tablet forms, as these forms do not support the Job list, Work queue and Workload controls.

Integration with Kofax RPA using .NET

When configuring an integration with Kofax RPA, **Cluster** option is available to select a group of robots.

SignDoc: Support for signing method "sign with image"

When configuring the SignDoc activity, an additional signing method, **Sign with image** is available that allows you to provide an image with your signature during the document signing process.

Support for field validators in a package

You can add a field validator directly into a package.

When you expand the Add list within a package, a **Field validators** option is available under Capture. This option helps you select one or more field validators which are added directly to the package.

When you search to add items to a package using All and the Capture filter, or when you compare, import or export a package, the field validators are included.

Copy for capture items

You can create a copy of a field formatter, field validator, and any of the capture profiles (Document conversion, Scan/VRS, PDF, Separation).

When you navigate to the list pages of these capture items, a **Copy** option is available in the context menu.

Folder variable: Display correct hierarchy

When you create or edit a folder variable, the child folder types are displayed in the correct hierarchy when selecting the folder type.

Document/Activity variants: Display correct hierarchy

When creating or editing document and activity variants, when you expand an extraction group on the document or activity variant list, the child document types are displayed in the correct hierarchy.

Add node name to exceptions that return the node ID

When you associate a process map for any of the following exceptions, you can provide the Node Name as an initialization parameter (at the end of the current initialization parameters list). When the exception is raised, the correct node name is displayed along with the other initialization parameters under Initialization Data, at runtime.

- EXP0009 - Script Object Failed
- EXP0018 - No Usable Resources
- EXP0019 - .NET Object Failed
- EXP0020 - Web Service Failed
- EXP0022 - C# Script Activity Failed
- EXP0023 - VB .NET Script Activity Failed
- EXP0025 - Data Access Activity Failed
- EXP0036 - Transfer Activity Failed
- EXP0038 - Automatic Activity Failed

Retention policy enhancements

You can add flexibility to better control when a document becomes subject to retention policy removal. You can also apply a different retention policy timeframe per document type, and if the retention policy fails, trigger an exception process.

This helps in managing the database size more efficiently, as you can use a retention policy to remove folders and documents that are no longer needed. It is also useful to meet any regulatory requirements related to document retention.

Retention policy deletes documents sent for Online Learning

The retention policy deleted documents collected as part of Online Learning. Online Learning documents are now not protected from retention so that they are not deleted.

Unlock job schedule

You can force unlocking a job schedule.

In the **Lock status search** screen, you can now search by **Job schedule**. When a job schedule is returned in the search results, you can unlock it from the context menu.

Settings for maximum number of activities and jobs to return

You can limit the number of activities or jobs that the system should return to prevent performance issues. When you retrieve a list of activities or jobs within TotalAgility, the set limits are applied.

Max number of activities to return

The label of existing "Work Queue Max number of rows to return" setting is changed to **Max number of activities to return**. This setting is now moved to **System > System settings > System > General**.

The maximum value of this setting is updated to 200.

When you upgrade to TotalAgility 7.8.0, if the current "Work Queue Max number of rows to return" setting is greater than 200, the renamed property **Max number of activities to return** is updated to be 200, if it is less than 200, it is set to the current value.

Max number of jobs to return

Under the same section, **Max number of jobs to return** setting is available. The default value of this setting is 200 and the maximum value is 500.

Exception for suspended jobs

Prior to TotalAgility 7.8.0, for suspended jobs, you needed to map each activity type, such as .NET node failed, web service failed, and so on.

A new exception, **Automatic Activity Failed**, is available at **System > System settings > Process > Exceptions**. This exception process can be launched regardless of the activity type.

See what machines are active

You can view a record of which services (Core Worker, Export Service, Transformation Service) are currently active and processing work using the setting **Heartbeat inactive interval** available in **System > System settings > System > General**.

If the Core Worker, Transformation or Export services remain inactive beyond this interval, the status of the corresponding entry in the "Machine names" table is updated as "inactive". (Default: 60 minutes, Range: Minimum=1 minute and Maximum=1 day)

Note This functionality is not supported in TotalAgility for an on-premise multi-tenant and Azure environment; it is only supported for TotalAgility on premise.

System settings search

A new Search option is available within System settings to help you locate an item easily.

When you enter text and search, all settings that contain that text are returned. You can open the setting from the search results and update.

Prompt for manual job archive in TotalAgility Designer

If you set the **Archive mode** to **Manual** in **System > System settings > Database, retention and reporting > Database settings**, a warning is displayed so that you do not turn it on accidentally. The manual archive starts only when you confirm selection.

Transformation Designer

OmniPage recognition engine

A new recognition engine is available for page and zone recognition. This engine is installed alongside Transformation Designer and is the default engine when creating new recognition profiles.

This recognition engine replaces the RecoStar and FineReader recognition engines that will be deprecated in the next release of Kofax TotalAgility.

Paragraph detection

It is possible to enable paragraph detection as part of recognition so that a document is segmented into detected paragraphs. The Classification Locator can then classify each paragraph and assign a class. Since the detected paragraphs are stored in the XDocument, they can be accessed via script.

Paragraph text on a document can be lassoed in the Document Viewer and that document can be added as a new sample to the classification training set.

Themes Locator - Natural language processing

This new locator uses the Natural Language Processing engine to extract the theme or topic of a document. This information is then available for custom analysis via script.

Summary Locator - Natural language processing

This new locator uses the Natural Language Processing engine to extract a summary of a document, page, or region, based on its configuration. The locator returns a simple field with the summary that can then be used by a script to store that summary in a database or display it in another way. This locator enables users to look at the summaries of several documents without reading each document separately.

Message Connector

Enable additional logs

A new parameter, DebugLog, is added to the GENERAL section of KFXConverter settings. If set to True, KFXConverter logs additional trace statements in the KFXConverter.log file in case of errors or exceptions (Default= False).

Poll subfolders for IMAP

When configuring an IMAP import source, you can poll the subfolder of a specific mailbox using the Poll sub folder check box. This is not applicable when polling IMAP mailboxes in a multi-instance mode.

Additional scaling sizes

When configuring the document conversion profiles to convert incoming files to TIFF, additional scaling sizes are added in the "Scale to" field.

Support for TLS 1.3

To upgrade the security standards, support is added for TLS 1.3 in the Message Connector Configuration. Also updated OpenSSL to support TLS 1.3.

Authentication using NTLM

When configuring an EWS import source, you can enable authentication through NTLM using the Enable NTLM Authentication option. NTLM authentication is only available for Exchange on-premise servers.

Added support for RightFax Rest Web API

You can configure TotalAgility to poll messages from RightFax server using RightFax's Rest Web API. RightFax server version 16.4 or higher supports the Rest Web API for the clients.

Additionally, RightFax client installation is not necessary on the Message Connector computer.

Multiple import sources with one Message Connector

You can connect FOIP and SMTP import sources to a single Message Connector connection and poll messages.

Multiple Message Connectors on a TotalAgility computer

You can install up to three instances of Message Connector on a computer running TotalAgility. For more details, refer to the *Kofax TotalAgility Installation Guide*.

Configure FOIP and SMTP in one import connection

You can enable FOIP and SMTP in the same Import connection.

MS Graph enhanced security

The "Tenant ID" and "Client secret" fields are added to the MS Graph import source for improving the security of an MS Graph connection.

Ignore folders in archives

In the Message Connector Configuration, specify a list of folder names that are part of a compressed file which you do not want to import. Use wildcards in the beginning, at the end or anywhere in the folder name, such as, __MACOSX, hex, *hex, h*ex.

Advanced conversion settings per Document conversion activity

You can configure advanced conversion settings for each Document conversion activity at the time of configuring Document conversion profiles.

Support for Auto-size columns in XLS, CSV

Column sizes are automatically expanded in XLS and CSV files to auto-size before converting them to TIFF/PDF. This ensures that data is not lost at the time of converting XLS or CSV files because of any small size columns.

Localization

The following are now localized and available in Japanese language:

- Message Connector configuration
- Message Connector help

Chapter 3

Changes in behavior

This chapter describes changes to the product behavior since the previous release.

Operating Systems no longer supported

- Windows Server 2008 R2
- Windows 7

Adobe Experience Manager Output service URL

The Adobe Experience Manager Output service URL is updated to:

```
http://<server name>/soap/services/OutputService?blob=base64
```

Designer navigation: Collapse sections

You do not have to scroll through the menu when working on multiple different types of items, such as resources, processes and forms.

If a section is open and a different top-level item is selected and you expand another section, the current section closes, and the newly selected section is expanded.

Update how authentication is displayed for Web service integrations

When you add a Web service reference, the terminology for integrations has become more obvious for authentication:

- The User Credentials label is changed to Authentication.
- The radio button for No is changed to None.
- The radio button for Yes is changed to Basic.

This applies to SOAP, SOAP WCF and RESTful Web Services.

Simulation related properties

The activation probability property for an activity, decision and end node are no longer available. Also, the Simulator database and any Simulator related SQL scripts are not available for new or upgraded TotalAgility installations.

System task for KM MFP

The System task for KM MFP - KM FTPFetch is renamed to KM FilesFetch because it supports both FTP and WebDAV.

Synchronization Activity Failed - EXP0027 exception

Synchronization Activity Failed - EXP0027 exception is no longer available in the TotalAgility Designer .

System query/charts

In the configuration of a Chart control, on the "Group by" list, the Design Activity Type option is removed. The same functionality is now handled by the Activity type option.

New database scripts

Replication_Reporting_Staging.sql and Replication_Reporting_Warehouse.sql are the sample scripts added for Reporting database replication available at the following location on the TotalAgility installation media:

```
\\TotalAgility\TotalAgilityInstall\DatabaseScripts\SQL Server\Reporting.
```

Functionality removed for reverted values

Previously, for process, form, activity, custom service, package, solution, navigation and form control names, the value was reverted to the last valid value when you entered an invalid value. This functionality is removed.

Features deprecated or removed

The following features or requirements are deprecated or removed in TotalAgility 7.8.0.

Automatic assignment and Allocation algorithm

The Automatic assignment of activities to resources and allocation algorithm settings are removed from Process properties and System settings in TotalAgility Designer.

RecoStar and FineReader engines

The RecoStar and FineReader engines are deprecated and will be removed in a subsequent release of Kofax Transformation Modules; instead, we recommend that you use the Kofax Omnipage engine.

Collaboration nodes and Message flows

Collaboration nodes and Message flows in pools and lanes are no longer supported.

Features scheduled for removal

The following features are scheduled to be removed in the next release of TotalAgility. Therefore, we recommend that you begin to discontinue using these features.

- Visio add-in
- Outlook add-in
- SharePoint web pages
- Process: Document set

Chapter 4

Resolved issues

This chapter describes issues that are resolved in TotalAgility 7.8.0.

Configurable timeout for Capture Data Migration upgrade

1603741: When upgrading to TotalAgility 7.8.0, there was a 30-second non-configurable timeout in the capture data migration.exe. This resulted in timeout errors when a 1.5 TB document database was upgraded.

VRS license missing or invalid

1602413: When images were ingested using the Scan form with the Image Enhancement setting enabled, scanning completed with the following error:

"VRS license is missing or invalid. Technical details: VRS: No license or license expired."

Capture Cloud Storage tab issue in Configuration utility

1598608: On a new TotalAgility 7.8.0 installation, when the capture binary data storage type was set to Windows Azure Blob Storage by configuring the account connection string, running the Configuration Utility did not retain the connection string configured during installation and the following error occurred:

"Capture Cloud Storage: Please provide a valid account connection string."

Issue releasing an extraction group

1465790: Could not release an extraction group in TotalAgility 7.6.0 that was imported from 7.4.0. An alert was displayed which listed the special characters that were not supposed to be restricted because these special characters were allowed in TotalAgility 7.4.0.

Global field validators did not execute correct order

1461084: When a document type with an invalid field value was validated using global field validator, the validation was not executed in the defined order and the records were not retrieved in the same order as defined in the fields.

Issue with comma decimal separator on a form

1459987: Comma decimal separators were added to the SQL error when values were inserted to a database in the German Language.

Radio button list in hidden cell caused validation

1456959: When the Radio button on a form with the Causes Validation property enabled was clicked, the control was validated even if the parent control was hidden.

Agility.Server.StreamingService.exe failed

1456443: The Streaming Service failed with the following error was logged in the Event Log:

HTTP Error 503. The service is unavailable.

Error in the Job list control

1455279: When a Job list control was configured with a work type, and a filter was created on metadata fields of the configured work type, the following error was displayed: "Work type field does not exist."

Width of columns in a control not displayed correctly

1449376: When the Job list and Work queue controls were configured to use percentage mode, the fixed width was considered instead of the percentage width.

Metadata not set in SharePoint online

1448400: When Microsoft SharePoint online was used to upload documents using the Add item activity, the document was uploaded but the metadata (columns) was not set.

Missing information in Message Connector documentation

1446000: The Message Connector documentation did not mention that the "allowPublicClient" parameter must be set to True to poll mail using MSGraph.

CreateJobInCase: Evaluation failed

1443335: When a job was created using CreateJobInCase, the following error displayed when the job tried to evaluate an automatic activity of type Expression. "Evaluation Failed: Retry Count 0 Reason of Failure: Object reference not set to an instance of an object."

Image processing activity issue with PNG files

1442788: When the Image processing activity was used to process the PNG files, few files were rejected with the following error: "The import file is the unsupported format."

GetJobVariable method issue

1441647: When GetJobVariable method was called from a form to save job variables to a table, the variable value and variable type ID could not be retrieved at the same time. At runtime, only one column and value were populated.

Bar code value and checksum

1441234: By default, Code39 bar codes that contained asterisks were not recognized with the default FineReader recognition settings.

TDS model failure

1399142: Trainable document separation in the Transformation Designer projects did not classify and separate the documents.

Incorrect folder permission path in the Prerequisites guide

1384276: In the TotalAgility Prerequisites Guide, the folder permissions path referred to the AppData folder instead of the ProgramData folder.

Drop-down list control issue

1383801: In a drop-down list control, when a large amount of text was entered in the text field, the value field was overwritten.

Issue converting PDF to TIFF

1383499: When PDF files with annotations were converted to TIFF format, an exception appeared and the process failed. This occurred when the Flatten XFA Forms to PDF/A Documents using Adobe LiveCycle was selected.

Job evaluation failed

1382267: Job evaluation failed with a Database Error when a dynamic resource string used for excluding resources included duplicate resource IDs.

Table evaluation did not work

1379761: Table evaluation in the Transformation Designer projects was not performed successfully.

Session timeout alert message displayed line break tags

1378791: Session alert messages displayed line break tags,
, instead of the actual line breaks (-) in the message.

Inheritance issues

1375723: When a child class in a Transformation Designer project had a different locator reread setting than its parent class, the parent reread settings were no longer executed during extraction.

ArchiveJobTask timed out

1372083: The same job was being archived multiple times simultaneously due to the ArchiveJob worker task being reset after a timeout. The thread was still running even after the worker task timeout (due to the large job history being archived). An error occurred while archiving finished jobs. The archive task was getting reset and run again while the previous one was already active in memory.

Issue with regenerated activity forms

1372991: The regenerated new activity forms did not regenerate the control IDs. As a result, there were issues when the original and the regenerated forms were accessed simultaneously (with form cache enabled).

Issue parsing winmail.dat file in Message Connector

1372620: The TNC_Tnef module was not able to parse the winmail.dat file and extract the PDF attachment even when the "Microsoft Tnef (winmail.dat) support" component was running.

Missing .BAT parameter in PATHEXT environment variable

1372527: The .BAT parameter was missing in the PATHEXT environment variable which resulted in failing the Kofax Message Connector (KIC-ED-MC) service start returning an error.

Null reference during evaluation of job

1372374: Using CreateJobInCase resulted in a null reference error.

Record history of deletejobhistory method did not chunk big jobs

1372072: The record history of the deletejobhistory method consumed many SQL resources without chunking big jobs. This caused a never completed archive worker task, DB contention, general DB timeouts and performance issues.

Mobile form table was not visible

1371309: The mobile form table was not displayed. This issue occurred only in the Chrome browser as a result of a recent Chrome update.

Data matrix bar code recognition issues

1369734: By default, the data matrix bar codes in the Transformation Designer projects should be recognized with the default FineReader recognition settings. However, if FineReader fails to recognize a Datamatrix bar code using the default settings, you can use scripting to improve the chances of bar code recognition.

This is possible because the `DetectInvertedZones` behavior is now available for editing via script.

If you want to recognize the Data matrix bar codes, you can add the following code to the `BeforeLocate` event.

```
Private Sub Document_BeforeLocate(ByVal pXDoc As CASCADELib.CscXDocument, ByVal  
LocatorName As String)  
If(LocatorName = "BarcodeLocator") Then  
Dim Loc As CscBarcodeLocator  
Set Loc = Project.ClassByIndex(0).Locators.ItemByName(LocatorName).LocatorMethod  
Loc.DetectInvertedZones = False  
End If  
End Sub
```

Error when Kofax RPA activity was configured in TotalAgility

1368775: The RPC connection failed and any calls subsequently made from TotalAgility to RPA raised the following error in TotalAgility: "You must write ContentLength bytes to the request stream before calling [Begin]GetResponse". This error occurred both at design time and runtime.

Unable to save or release process map

1368732: Process maps could not be saved or released when the nullable date default value was 01/01/1900 or anything earlier than 01/01/1970.

Faulty error messages (in German)

1363460: On a form with Calendar control and capture field, when the browser language was set to German, the following issues were encountered:

- When some invalid data (for example, 24.10.2019a) was entered in a Calendar control, and the cursor was moved over the field, the date format translated to German was visibly incorrect.
- Moving the cursor over the red exclamation mark icon did not display proper error message because there was no time input.
- In the Capture field, the beginning of the sentence did not begin with a capital letter.

The DB connection results screen required DB creator access

1362423: If the installer was to overwrite the pre-existing databases (as opposed to creating new databases), then the account used to connect to the database was not a member of the `DB_OWNER` role.

Capture activity types did not appear in business rules

1359654: When an activity was added in a business rule, the Type drop-down list did not display the capture activities.

Archiving issue when job was restarted

1353673: The jobs that were completed or terminated and then restarted were still archived and moved to the Finished Jobs table.

Lost source file names in attachments

1353531: When an Email activity was used to send the documents in a folder as attachments, the attachments were sent successfully but the file names of those attachments were missing and only file extensions were available.

GetWorkQueueOverview API allowed SQL injection

1353137: The text of the category ID parameter of the ActivityFilter parameter to GetWorkQueueOverview was used directly in a SQL query that allowed for SQL injection.

Issue mapping table column

1346816: When a new action was created, user could not map a boolean table column on a form to a stored procedure parameter of type bit.

Styles not applied to form cells

1352075: The custom style sheet was not applied to cells.

Custom Work queue returned error

1344798: In a form, if a work type was mapped to a work queue control in TotalAgility 7.5.0 and then upgraded to 7.6.0, loading the work queue resulted in the "Parameter Count Mismatch" error even if there were no jobs of the associated process in the system.

Size issue of Category drop-down

1343599: The category field in the Edit query window of Findjobs.form was too small and required scrolling for category names longer than 8 characters when the resolution was set to 1366 x 768.

Advanced Evaluator inheritance issue

1343422: The Transformation Designer failed when a Script Locator was defined before an Advanced Evaluator in the locator hierarchy of an inherited class.

Using @ escape character caused upgrade failure

1343241: When the Expression nodes used "@" in the expression, TotalAgility upgrade to 7.6.0 failed with the following error: "Agility.Server.Common.ErrorHandling.UserException: Invalid rule: Unterminated string".

QR bar code recognition

1342366: By default, QR bar codes should be recognized with the default FineReader recognition settings. However, if FineReader fails to recognize a QR bar code using the default settings, you can use scripting to improve the chances of bar code recognition. This is possible because the `AdvancedExtractionMode` behavior is now available for editing via script.

If you want to recognize QR bar codes, you can add the following code to the `BeforeLocate` event in Transformation Designer.

```
Private Sub Document_BeforeLocate(ByVal pXDoc As CASCADELib.CscXDocument, ByVal  
LocatorName As String)  
If(LocatorName = "BarcodeLocator") Then  
Dim Loc As CscBarcodeLocator  
Set Loc = Project.ClassByIndex(0).Locators.ItemByName(LocatorName).LocatorMethod  
Loc.AdvancedExtractionMode = False  
End If  
End Sub
```

Job retention did not find case fragments for deletion

1337705: When job retention was enabled in a case definition and case fragment, job retention did not purge the case fragments as the fragments were not retrieve from the finished jobs database.

Setting incorrectly applied to mandatory activity fields

1336806: In a verification activity where activity level fields were set to mandatory, and “Allow Verification to complete with unverified fields” was set to Yes, the setting “Allow [Validation/Verification] to complete with [unvalidated/unverified] fields” was applied to mandatory activity fields instead of applying only to document/folder fields.

Issue mapping string variable to byte[] parameter

1336721: String variables could not be mapped as an input or output to byte[] array type. The string variables did not appear in the filter.

Default values not cleared when ResetDefaults was clicked

1336633: When ResetDefaults was clicked on a Drop-down list control data, it held the previously checked value at runtime instead of clearing the default values.

Case fragments unavailable for selection

1336492: The case fragments were not available for selection in the Work queue control or Work queue queries.

XML activity got suspended when used in a subjob

1332511: When the XML activity was used in a subjob, the job suspended with the following error, "Error performing automatic activity."

Passive inputs in overdue state in Message Connector

1330656: When the passive input list was reset by calling the "inputlist-reset" API from TotalAgility during an ongoing active poll, passive inputs went in an "Overdue" state which prevented the import of documents.

Audit log entry incorrect for activity reassignment

1330581: The audit log entry for activity reassignment displayed the TotalAgility system account instead of the resource name who reassigned the activity.

Upgrade error message not informative

1328637: When a decision node that contained an invalid expression was used in a process, the TotalAgility upgrade failed with the incorrect error message instead of giving a more informative error message that included the process name, version and node name of the rule that failed to be upgraded.

Could not use count rows in DBQuery action

1328154: In a form, when a DBQuery action was used to get the aggregate function count rows, the following error message was displayed, "Please select at least one column" even if one or more available columns were already selected.

Issue in work type date field of a Work queue query

1327982: When a Work type with a date field was mapped to a process, and a Work queue control initialized with a Work type query, at runtime, the Work type date column in the Work queue query was displayed in long-date format.

Issue in Redirect action

1327650: In a Redirect action, initialization variables were mapped successfully on Capture tables document forms, but if you tried to modify (unmap and remap) the variables, an [Object Object] was displayed.

Missing field after document ingestion

1327369: When a Microsoft Word document was imported in TotalAgility, the values from the calculated fields in the original document displayed "Zero" in the output image.

Issue in text string with ampersand

1325490: An ampersand in a text string caused the string to be truncated when passed to a pop-up window. For example, "Shipping & Handling" was truncated to "Shipping."

Issue with auto-generated document forms

1324937: Could not create a job on auto-generated document forms if the document type name was longer than 80 characters.

Issue with cached forms

1324593: When the forms cache was enabled, it caused an issue when applying display rules.

Drop-down list display issue

1324379: On a form when the drop-down list was expanded and a value was selected and scrolled vertically, the expanded drop-down list stayed in the same position in the screen.

Natural Language Processing confidence issue

1321559, 1320959: The Natural Language Processing confidence of an alternative in the Transformation Designer was not consistent with average confidence of all the located mentions.

Natural Language Processing locator error

1321411, 1320885: In an earlier release, you could not draw a region on a page and then test or use that region without it causing an error in a Transformation Designer project.

Issue with large data package extraction in Microsoft Edge

1317244: When the Microsoft Edge browser was used to extract any data package with more than 100 MB, the process was delayed and continuous loading messages were displayed.

Named Entity Locator highlight issues

1317047, 1317053: The Named Entity locator did not highlight the first of many instances or the one with the highest confidence. This resulted in the worst possible (often incorrect) instance being used as the alternative text and coordinate.

1317027, 1317030: When the Named Entity Locator was tested, all locator alternatives were displayed in the Document Viewer each time the Test button was pressed on the Test Results tab.

Named Entity Locator missing entities

1317021, 1317033: When extraction was performed for the Named Entity Locator in a Transformation Designer project, a complete list of entities was not extracted as expected.

Named Entity Locator missing scrollbar

1317020, 1317037: A scrollbar was not displayed when it was required.

Training extraction extra windows

1315675, 1246992: When there were no documents in a document set, the progress bar window was not displayed if extraction training was performed for that document set.

Entity extraction failure

1313696, 1320629: The Test button on the locator was enabled if no language was configured at the class-level.

Table Locator issue

1280195: The Table Locator in the Transformation Designer projects was not ignoring lines extracted after the end of the table was found.

Folder import issue with section sign in password

1290618: When a folder import source was configured and the user account had a section sign '§', clicking the Test Folder Import button resulted in a login error.

Tenant database issue

1275779: In an on-premise multi-tenant environment, when one tenant's database was down, the other tenants were affected, especially for transformation activities that did not process until the other tenant came back online.

GetWindowsUser() returned app pool user in a distributed system

1155764: When the GetWindowsUser() was called in a single-machine installation, it returned the logged-on user correctly, but when called in a distributed installation (separate web and app server), it returned the app pool user instead of the logged-on user.

Association with document sets not exposed to process map

1152375: If you tried to export or delete a process map that was used in a Document set, an error message did not appear to inform you that the process must be un-associated in order to use it.

HP FutureSmart 4 MFPs: empty screen after paper jam fixed

1152074: After fixing a paper jam when sending a document to a scan activity shortcut, an empty Kofax window appeared instead of the Kofax main menu. This issue occurred with HP FutureSmart 4 MFPs when you pressed Start to resume scanning, pressed Done after the scan was complete, pressed Cancel to cancel the job, and then pressed Exit or Back to dismiss the Message Center window.

Internet Explorer issue with Fax import source

1130665: If the number of users was very large in a RightFax server, selecting a user caused the Internet Explorer to fail while configuring the Fax import source.

Issue when German language pack was imported

1080994: When the German language pack was imported, the German translation for the JobDetailsProperties.form was not active.

Split login with the Scan activity did not display a valid error

911996: On the Lexmark eSF and Emulator, a split login should have displayed an error when you took the Scan activity from an embedded process, because the document or folder was not created. Instead of a descriptive error message, "the application is unresponsive" on the Lexmark eSF, or "the user can scan, a Web service exception" appeared when you clicked Send and Exit on the Emulator.

Chapter 5

Known issues

This chapter describes issues that you may encounter while using TotalAgility 7.8.0 and provides workarounds, as applicable.

Error after applying older fix pack to TotalAgility 7.8.0 R2

1603998: If you install TotalAgility 7.8.0 R2 and then apply any TotalAgility 7.8.0 Fix Pack that preceded Fix Pack 6, an error occurs when you attempt to process a job in Validation. As a result, the job is suspended during extraction and the following error appears:

"Error occurred while executing script or method. Could not load file or assembly... ."

Workaround: In a TotalAgility 7.8.0 R2 environment, you can safely apply Fix Pack 7.8.0.6, or a subsequent fix pack.

Error when scanning on a Canon ScanFront device

1497695: When TotalAgility is installed on a Docker container, the following error appears when scanning on a Canon ScanFront device, "Parameters are not valid. Check parameters."

Workaround: Set the following advanced settings in the TotalAgility Devices:

- ProxyServer: IP address of the TotalAgility Docker
- ProxyServerPort: 5000 (the Docker server port address)

Job status not updated on HP MFPs when network cable is unplugged

1465869: When scanning a large job on HP M577 MFPs, if the network cable is unplugged, the status still indicates Sending even though the job is no longer being sent.

Issue viewing integration associations

1418788 When you import the following integration nodes that are configured in previous versions of TotalAgility to 7.7.0, you must reconfigure the process (all types) to view the process associations.

- CMIS - All nodes
- SharePoint - Create Folder Node
- Micro Focus Content Manager - All nodes
- Dynamics CRM - Dynamics CRM node
- CMIS - All nodes
- Web Service - RESTful Service type

A2iA Document Reader performance degradation

1252327: During OCR processing for Transformation Designer projects, performance degradation occurs when using the A2iA Document Reader recognition engine.

Issue with HP client when "totalagility" is specified for the path

1202067: When registering an HP client with the HP Client Registration tool, entering "totalagility" as the path causes problems with log on in an on-premise multi-tenancy environment. The logon screen does not appear completely, and clicking a personal shortcut does not work.

Workaround: Enter TotalAgility (note capitalization) as the path in the HP Client Registration tool, and the HP client works correctly.

Delete button is inconsistent on Lexmark cSF image preview

800873: The Delete button on the Lexmark cSF image preview works inconsistently, depending on how the document is scanned. When the document is scanned on the flatbed, pressing Delete removes that image. When the document is scanned from the ADF, pressing Delete cancels the entire job.

OCR engines/languages handprint support

The OCR engines (both FineReader and OmniPage) do not support handprint Japanese characters in Capture and MFP Starter Pack.