

Kofax TotalAgility

Release Notes

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Chapter 1

About this release

The release notes give you information about TotalAgility 7.5.0. Please read this document carefully, as it may contain information not included in other product documentation.

Version information

The build number for TotalAgility 7.5.0 is 7.5.0.0.0.656.

To verify the build number:

1. Use TotalAgility Designer to select **System Settings**.
2. Under **Manage**, click **Settings**.
3. On the **General** tab, in the **Product Version** field, locate the last four digits, which correspond to the build number.

Chapter 2

New features

This chapter describes the features and enhancements included in TotalAgility 7.5.0.

TotalAgility

This section describes the new and enhanced features in TotalAgility.

Solution life cycle management

This section describes the features related to package deployment configuration.

You can create specific deployment configurations, such as Test and Production within which the global and server variable values and integration configuration can be configured. The deployment configurations enable solutions to be deployed on the target server without the need for manual configuration.

When creating a package, a new option, Deployment Configuration, is available for managing deployment configurations for the package. These deployments are stored as part of the main package definition.

Items that can be configured include server variables, global variables, web service references, Device settings, Transformation settings, and Export connectors.

When exporting or importing a package, you can either select the base package or a specific deployment configuration.

You can specify a deployment on export using the SDK:

- Package Service: ExportPackageToBytes2: Exports the package as a byte [].
- Package Service: ExportPackageToFile2: Exports the package to the specified file location on the server.

Enhanced integrations

This section describes the new or enhanced features related to integration.

CCM

TotalAgility 7.5.0 is compatible with CCM 5.1.1 and above.

The following features are added to CCM integration.

CCM Pack activity

A new activity type, CCM Pack, is available to extract documents from a CCM pack. This activity can be used to extract documents from the pack and store them as individual documents in the repository. You can then interact with the document in the same way as any other document in TotalAgility.

CCM import slots

CCM allows the definition of "Import Slots", allowing TotalAgility to provide a document, such as a scanned document, to a Slot in a Document Pack. From then on, the document becomes part of the Document Pack and can be distributed along with the rest of the contents of the Document Pack.

When a document pack template is selected in the CCM Compose activity, any import slots defined in the pack template are shown to the user.

When the document pack is composed, any additional documents in the slots are imported and become present in the pack. For example, on distribute or review of the pack, the imported documents are included.

CCM: Rule-based distribution

TotalAgility supports a new distribution mechanism in CCM where each Document Pack is distributed according to centralized rules, which can be configured in the CCM Process Engine. These rules may be based on legal requirements, corporate policies, customer preference, or other requirements.

When you enable the Distribute option in CCM Compose or CCM Distribute activities, a new distribution option, Output Management, is available for Document Pack Templates. When this option is selected, CCM determines the channel used to send the documents, and the channel drives the output type.

Manually install CCM proxy without the Web Platform installer

You can install the CCM proxy without using the Web Platform installer and the CCM proxy installer. See the *TotalAgility Installation Guide* for instructions.

SignDoc

TotalAgility 7.5.0 is compatible with SignDoc 2.1 and above.

Use multiple TotalAgility servers

You can use multiple TotalAgility servers with a single SignDoc server, where each one would use a different SignDoc account.

Configurable package name

You can configure the name of the package sent for signing so that a more user-friendly name is shown when the documents are being signed or reviewed. The configured name appears in any emails and on the SignDoc interface.

A new property is available in the SignDoc activity configuration that allows you to configure the name of the signing package, using a variable or inline value.

Configurable recipient name

TotalAgility uses the generic names specified for the signer or reviewer when creating a template in SignDoc. You can customize the generic names to display names so that the documents are sent with the display name. For example, configure "Consultant" for Doctor or a manager's actual name for Manager.

CMIS: Web services security

When adding a CMIS compliant site, an additional authentication type, WS-Security, is available to apply security to the Web services. If you select this option, you must provide user name and password.

TRIM: Expose all the metadata fields for a record type

You can provide values for all the metadata associated with a record type when adding a folder or document to TRIM. As a result, the values mapped to the properties of the record type are reflected in the object in HP TRIM.

SharePoint: Metadata column support in SharePoint document library

The SharePoint Add Item activity supports the following additional SharePoint column types as part of metadata mappings: managed metadata, enterprise keywords, lookup, and choice.

Insight: Map Insight role to a TotalAgility group

You can map a new Kofax Insight role to a group in TotalAgility.

Additional import options

The following new import options are supported.

- Folders other than Inbox when importing emails from EWS, IMAP
- Subfolders for polling via EWS
- All the fields in TotalAgility that are available in Kofax Import Connector for mapping to process variables.

Capture

This section describes the new or enhanced features related to Capture.

Masking and redaction

You can draw masking areas that cannot be seen by others who view the image. This prevents unauthorized users from seeing sensitive information. Both implicit and explicit masking are available.

- Implicit mask refers to automatic masking based on a hidden field's linked OCR coordinate. These masks only appear on forms where a field is hidden from the user, based on activity variant, or extraction group permissions.
- Explicit masks are applied explicitly through the use of SDK, or manually drawn using the Web Capture control. These masks stay with the image until it is explicitly removed. The Web Capture control has new annotation tools: Mask and Redaction. These tools can be enabled in the properties of Web capture control in Form Designer.

Without proper permissions, you cannot remove the mask, access OCR data behind the masked area, or access the original image without the mask. The mask is not destructive, and does not alter the original image itself. Image masks can be black or white.

The following CaptureDocumentService SDK methods are related to mask:

- AddPageMaskForField: Adds mask to a page for words associated with the specified field.
- AddPageMaskForRegion: Adds mask to a page for the specified rectangular area. All the obscured words are removed from the page.
- GetAllMaskedWords: Returns all words masked in a page.
- GetAllPageMasks: Returns all explicit masks associated with a page.
- RemoveAllMasks: Removes all masks for the specified page.
- RemovePageMasks: Removes masks that intersect the specified rectangular area.

Scan/VRS profile and VRS Elite profile interaction

When scanning through VRS Elite's Twain-On-Top scan source, image processing is handled by VRS Elite, which is linked to the VRS Elite Profile used.

VRS Elite Profile is a profile specific to VRS Elite, and is different from TotalAgility's Scan/VRS Profile assigned to the Scan Client.

A new setting, Set Kofax VRS Elite Profile from Scan/VRS Profile Name, is available in TotalAgility Designer under System Settings>Settings>Form tab. You can use this setting with the Scan Create New Job and Scan activity forms. This setting automatically sets the VRS Elite profile based on the assigned TotalAgility Scan/VRS profile in the Scan Client, eliminating the need for scan operators to make the selection.

Scan Client attempts to set VRS Elite Profile before every scan. If user manually changes the Scan/VRS Profile used, Scan Client attempts to set the corresponding VRS Elite Profile when scan is initiated. If no matching VRS Elite Profile is found, Scan Client will ignore the issue and continue scan using the currently selected VRS Elite Profile.

Linked Server setting: Authenticate against Windows

When configuring a Linked Server, use the "Authenticate against Windows" setting to authenticate the user name and password stored in Kofax TotalAgility Linked Server against the Windows authentication on the target server. If the authentication fails, the job is suspended.

Image Quality Analysis

A new capture activity, Image Quality Analysis, is available under Capture activities. This activity is used to determine if an image is suitable for classification and extraction of data. Using this activity, you can identify problem images to reduce exception handling costs. For example, depending on the issue found, apply different eVRS profile or if the image was generated by a mobile user, let them know to retake the image.

Image Quality Analysis only supports small images, such as ID cards and passports.

Document Conversion activity

A new activity, Document Conversion is available that supports preparation and normalization to PDF/A options, including additional options for converting documents to images and normalization of images in the process.

A Document Conversion activity runs within the Transformation Server. If you want to use MS Office for the document conversion, then you must change it in the Document Converter Configuration tool available at (default location):

```
C:\Program Files (x86)\Kofax\Document Converter\Configure.bat
```

Document Conversion profile

A new profile, Document Conversion Profiles, is available in the system settings. This profile contains conversion settings for converting the incoming documents to TIFF or PDF. The same conversion profile can be used in different process map through the Document Conversion activity.

Capture process

Use the Capture Process property to specify whether a process can be considered as a capture process so that the data within Kofax Analytics for TotalAgility reports can be used to filter the data returned.

Enhanced Export and Delete activities

You can mark the exported and deleted documents as complete at runtime to differentiate between documents that have completed capture processing and the documents yet to be processed. If the Export or Delete activity is not the end of document processing, you can choose not to mark the document as completed.

Display total amount of scanned pages

When scanning using a Scan Create New Job or Scan activity, you can view the following scan statistics related to the current scan job to verify if the number of documents scanned are the same as the physical documents.

- Total number of pages being scanned or imported, including any blank pages.
- Number of auto-removed pages due to blank page removal (image processing setting) or patch code deletion.
- Total number of pages in the job that include pages from all sources.

Lasso zoom an image

You can zoom an area of the image using the Lasso Zoom option without having to use the mouse. You can lock the Lasso Zoom option using the Lasso Zoom Lock Mode option. The Lasso Zoom Lock Mode option keeps the user in lasso zoom mode after performing the lasso zoom action. Two new configurable keys are added to System settings in TotalAgility Designer.

Field analytics options

You can specify field behavior in Analytics so that sensitive data can be secured in Kofax Analytics for TotalAgility, and database storage requirements are managed. A new option, Include in Analytics, is added to the document type and folder type fields to cater to this requirement.

Recording document and page counts for Analytics reporting

When the Include In Analytics process setting is enabled, in addition to ensuring that the data related to jobs for this process is picked up by Kofax Analytics for TotalAgility reporting, it also records the documents and page counts for the process activities in TotalAgility that can be used by Kofax Analytics for TotalAgility reporting.

Globally defined validation methods

You can define field validation rules globally and reuse them on specific fields so that you do not have to define the rules frequently. You can use the global field validators at the field level of document types and folder types. However, these rules only apply to standard, regular expression, and date validators.

Limited to Online Learning

Limited to Online Learning is one of the access type available to maintain an extraction group in TotalAgility Designer.

Users with this access type can open an extraction group in the Transformation Designer to update Extraction Online Learning. They can import and review new sample documents that are collected by the Online Learning system, add and remove training documents, do test extraction, run benchmark, resolve conflicts, and retrain project. They can then release the updated extraction group.

However, they cannot modify the design or settings for the extraction group. For example, cannot add, remove or rename classes, fields and locators, or cannot access scripts and project settings.

For more information on Extraction Online Learning, refer to *Help for Transformation Designer*.

Date formatter enhancement

The Date formatter now accurately formats dates when the month is spelled out and may have OCR errors, such as Jonuory 5, 2016.

PDF Generation settings

TotalAgility supports PDF version 1.7. You can select a PDF/A Compliance type based on the selected PDF version, and also select a format for the Black and White, Gray and color pictures.

Document type: Auto-complete filter

When manually typing into the change document type drop-down box, TotalAgility prevents users from typing in characters that are not valid.

For example, assume the following document type names are available: AAAA, AABB, ABCC and ABCD.

When user is typing in document type names, only the allowed characters can be typed:

- A (A and B is allowed)
- AAA (Only A is allowed)
- AB (Only C is allowed)

- ABC (C and D is allowed)

New folder properties

Two new properties are available in folders:

- HasUnclassifiedDocument: A boolean property that indicates if the folder contains any unclassified document.
- HasUnconfidentlyClassifiedDocument: A boolean property that indicates if the folder contains any unconfidently classified document.

These properties are useful as a quick qualifier for job routing in the process, such as skipping document review.

Dynamic image processing

TotalAgility supports dynamic image processing.

During image processing, each page is checked for text extension, SkipImageProcessing. If the text extension is present, then this page is not processed by the Image Processing activity.

Before processing each page, the page is checked for a unique eVRS command string, EVRS Settings, in the text extension. If this string is present, it is used to command eVRS instead of the string from the Image Processing activity configuration.

After a page is processed through eVRS, the resulting metadata from eVRS is stored on the page in a text extension, ProcessedMetadata, so that it may be queried for information to be used later in the process map.

Property change history

In Transformation Designer, a new feature, Property Change History, is available on fields. The property change history helps you in extraction debugging. You can get an insight into changes done during different steps of the field extraction: Locator, Formatter, Validation, Script, Event hierarchy. This reduces costs to create transformation solutions.

Remote scan enhancement

A new asynchronous upload capability is available in TotalAgility that allows scan operator to continue on to the next batch, without needing to wait for the previous scan job to complete upload.

This upload capability is offered through lightweight local agents that can be deployed through an msi file included in the TotalAgility installation media at at \\TotalAgility\ScanAgentService. It reduces administrative cost as compared to a full linked server installation.

This capability is useful in remote scanning scenarios, where the scan station has limited network bandwidth to the main TotalAgility site. It allows scan operator to keep up with physical scanning throughput, while image upload is done in the background.

Kofax Clarity

A new OCR profile that uses a cloud-based OCR engine.

This recognition engine performs full-page recognition and is specialized to recognize text at any location on an image. For example, photographs of people or places, street signs, ID cards, or business cards. Because these images can be distorted, have perspective issues, or contain glare from reflected light, Kofax Clarity can overcome these issues to provide successful OCR results.

These benefits are possible because Kofax Clarity uses the scalability of cloud computing to perform Optical character recognition over an internet connection. This cloud architecture has the additional benefit of moving OCR processing online and away from the Kofax Transformation Modules Servers. All transmitted data is encrypted over an HTTPS connection.

Workspace

This section describes the enhancements in TotalAgility Workspace.

Workspace styling

The Workspace has a more modern look.

A new theme and style sheet is available that applies the Kofax aligned style; this removes any dependency on CSS knowledge.

On an upgrade, the classic style remains, and you only get the new style if you import the Workspace package. On a clean install, the new style is applied by default. You can switch between classic and modern, as desired.

Changes to Workspace due to styling include:

- The Workspace has a new header.
- All the forms use percentage width, and are set to 100% to use the full screen.
- The Workspace uses the Noto-Sans font.
- The Work Queue, Job List, Workload, and Case Health controls have a new look.
- The layout of the generic and built Take Activity forms has improved.
- Primary button style is applied where appropriate.
- Labels use heading size H1, H2, H3 and others.

Job/Process Viewer: Highlight selected lines

You can select the flow lines between the activities in the process or job viewer for ease in identifying the path between activities. This approach is helpful when multiple paths exist into or out of an activity.

JobList and Work Queue controls: Retain runtime column resizing

You can resize the column width for the Work Queue and Job list controls, including the work type fields, and retain the resized columns for the current session. When you perform an action, and navigate away from the job list or work queue, the resized column width is retained for the current session.

Forms

This section describes the enhancements related to forms.

Form templates

You can create a form template with predefined sections of a form containing a number of controls in a specific layout along with actions, and use this template on multiple forms to reuse controls and actions across forms. Once a form template is created, you can lock and unlock it, distribute it as part of a package, and protect it within a package.

Form variants

You can create variants of a form so that you can adjust how the form appears at runtime based on certain criteria. You can open, copy, delete, and unlock a form variant.

When creating a form, a new action type, Apply Form Variant, is available for desktop, phone, and tablet forms. When this action is executed, the latest version of the variant is applied, and the state and label text as per the variant is reflected at runtime.

The following APIs are added to the TotalAgility SDK to help you create, update and delete form variants easily.

- GetFormElements
- GetFormVariant
- GetFormVariants
- AddFormVariant
- UpdateFormVariant
- DeleteFormVariant

Create new form: Set common properties up front

You can provide key form details up front before creating the blank form so that you do not have to create a blank form, and change the properties you always change.

Heading labels

When configuring a theme, a new group, Labels, is added to select the style for Basic Label and Headings 1-6.

When configuring the properties of a Label, use the new label types, Basic (default) or Heading to structure the content on the form at runtime. For the Heading label type, an additional Heading Size property is available to set the label to different sizes with values ranging from 1 to 6 (where 1=20px, 2=16px, 3=14px, 4=12px, 5=10px and 6=8px. Default:1.)

Noto-Sans font

The Noto Sans font is available for selection in a theme, or when applying an inline style to your controls.

Style forms using predefined themes

You can select a predefined style for your theme and the new look is applied automatically to all forms using that theme. You can select a style to apply to the desktop forms from the Desktop style list, and to

the touch forms from the Touch style list. For a TotalAgilityWorkspace theme that is imported from the TotalAgility Workspace package, the Touch and Desktop styles default to TotalAgilityWorkspace, and the style sheet defaults to TotalAgilityWorkspace.css.

Updated form layout

The layout for the manual and generated Take Activity forms is updated so that the information is displayed in a better format, and the input and output are more distinguishable.

The layout for the generated Create New Job forms is updated so that the information is displayed in a better format.

Toolbar control

A new control, Toolbar, is added to the advanced controls of forms. Use the Toolbar control to group buttons in one control. This control is available for the desktop, mobile, and tablet forms.

Chart control

A new control, Chart, is added to the basic controls of forms. Use a Chart control to add charts to a form, and create a visual representation of data returned from a Work Queue, JoList or System query. The chart displays a count of items grouped by fields and the total count of items. You can give a 3D or 2D look to the Bar chart, Pie chart, and Column chart using the options available in the Chart control.

Primary button

You can configure a particular button on a form to be the primary button. The primary button is visually different from all other buttons and indicates the button that is most used, or that is the main action on a form. A new property, Primary Button, is available when you add a button to your form.

Button control: Display summary of invalid fields

You can display a list of invalid fields at the top of form, and click on error to go directly to the invalid field. This property assists users in completing long forms, or forms with fields in collapsed panels or tabs that do not currently have focus. An additional property, Show Validation Summary, is available for a button. This property when set to yes for button that causes validation, displays a list of invalid fields. the list of fields can be closed.

Table control: Allow localization of table headers on capture forms

You can localize capture table headers on capture forms. When you export a language for a form that contains a capture table control, the table headers are also included.

Table control: Wrap text in cells

You can wrap text inside a table cell when it does not fit the available width without having to expand the cell or hover over it to get a tooltip. A new property, Wrap Text, is available on a table cell when the data type is String or Date, and the column type is Text.

Table control: Auto-adjust row height

When a font is applied to a form at runtime, the rows in a table on a form auto-adjust to accommodate the font in use. The auto-adjust row height feature also applies to the Work Queue and Joblist controls. You can apply different fonts to the same form at runtime when viewing forms using sites and themes.

Web Capture control: Enhancements

You can grant a resource or the member of a resource group the ability to mask in the Web Capture control. A new option, Web Capture Mask and Redact Images, is available under capture permissions to allow masking images. The Administrators group has the mask image rights by default.

The following buttons are newly added to the Web capture control toolbar:

- **Undock:** Use this button to undock (detach) the document viewer from the main form and display in a separate browser window so that it can be viewed on a second monitor. This helps in viewing the image or document on one screen while completing the form on the other screen.
- **Draw Mask:** Use this button to draw the area to mask on the image.
- **Draw Permanent Redaction:** Use this button to permanently alter the image, so that you are able to remove sensitive information that should not reside in your database.

File Upload control: Button design

You can configure the button and label on the File Upload control so that you do not have to use the default style, and the fixed width and height in your solutions.

Cell: Border

The Border property within the inline style of a cell has been expanded. You can now set borders on specific sides of a cell, and prevent double borders.

Cell: Alignment

A new property, Alignment, is available for cells that helps you easily align content within a vertical or horizontal cell, reducing the need to use padding.

Enhanced Redirect action

On redirecting back to the original page where the current page was launched (Origin), you can traverse through the form history using the Use Breadcrumb Trail option.

Form settings

The following form settings are added new.

Column splitter

On percentage width forms with more than one columns, you can enable a splitter between the columns, and also show the column splitter at runtime. Two new properties, Enable Column Splitting and Show Column Splitter, are available under Design group of general properties of form.

Using the column splitter, you can resize the columns and the content within each panel resizes accordingly. For example, properties on one side and a document on the other. Splitting a column gives users more control over the layout.

Update control width setting

A general property of form that helps you to update the width for all controls at one time instead of configuring each control individually.

Use browser tab order

A general property of form that helps you to set the default browser tab order rather than setting a specific tab order on each control.

The tabs in a browser typically function in the following order: first column - first row - first cell including all controls left to right, top to bottom within the cell - next cell in the row - next row - next column.

Expand last row to fit

A general property of form that enables the last row taking up the remaining browser window with the control that is set to Expand to Fit.

Mini-viewer

An advanced property of a document form that helps you to display the mini-viewer for all controls at one time instead of configuring each control individually.

Navigation - Enhancement

When you add a child menu option, the parent is expanded (if it is not already) so that you can see the items being added.

Others

This section describes other new and enhanced features.

Custom headers for web service integration

When defining a web service reference in TotalAgility Designer, you can specify custom headers as name and value pairs.

When the corresponding Web Service or RESTful node executes at runtime, these custom headers are passed to the Third Party web service.

You can use this functionality to call web services from TotalAgility that require a custom authorization header.

Job suspend reasons

You can associate a potential suspend reason with an automatic activity.

When the activity suspends, this reason is then recorded against the job. You can search for all jobs that are suspended by a particular reason and bulk activate them.

Whitelist server URLs and database connection strings

You can whitelist the web service URLs and the database connection strings that can be employed by TotalAgility to make web service calls or run SQL queries against TotalAgility. This allows administrators to secure their servers by preventing connections to any arbitrary host or ports.

In the TotalAgility Designer, under System Settings, a new Whitelist tab is added where you can specify whitelisted URLs and database connection strings.

JSON Expression variable

You can create a process, case or server variable of type JSON Expression to retrieve data from a JSON string as per the expression text (JSONPath). JSONPath is the expression type of the JSON Expression variable. It uses special notation to represent nodes and their connections to adjacent nodes in a JSONPath path.

Support mapping byte parameters

You can map document variables and string variables to a .NET activity and Web Service activity as follows:

- To help transfer document data, use document variables as an input or output to the byte[] array type parameter and select the required file type.
- To help transfer asset binary data, use string variables as an input or output to the byte[] array type parameter.

Tag a process

You can tag a process to allow Kofax Analytics for TotalAgility to apply a custom filter on a report. A new option, Reporting Tags, is added to System settings that allows you to add, modify, and remove one or more pieces of text (a maximum of 50 characters). A new process property is available to select a system level reporting tag.

DAS optionally support accessing schemas

A new System Setting in the TotalAgility database allows you to configure the DAS node to access database objects in a database schema that is not owned by the current database user (which they still have access to). This setting is off by default, and is only available on request, as turning this ON could be a security risk.

Evaluation Failed status

A job that has failed evaluation cannot be suspended or set to an active state. A new Evaluation Failed job status is set for the jobs that have failed evaluation.

Reorder lookup items

You can change the display order of the lookup items.

Prevent continuous looping

Continuous looping in a synchronous job or business rule can cause an excessively high workload on the TotalAgility server. To prevent this issue, use the Maximum Loop Count property (at process level and system level) to set the number of times an activity can be executed in a synchronous job or business rule. (Default: 1000)

Package Streaming Service: Import/Export package SDK APIs

Import and Export package SDK APIs (Stream ExportPackageToStream(), SpaPackageImportResult ImportPackageFromStream(Stream packageData)) are available for use on the Package Streaming Service and allows large packages to be imported or exported via custom code only.

The package export and import settings are passed in via a HTTP header due to restrictions with passing parameters and streaming in WCF APIs.

PackageStreamingService SDK APIs cannot be called from .NET activities or .NET form actions as they require streams to be used which are not available in TotalAgility processes or forms.

The package export and import settings are passed in via a HTTP header due to restrictions with passing parameters and streaming in WCF APIs.

MFP

This section describes the features related to MFPs.

MFP Maximum Paper Size Support Update

The MFP Maximum Paper size behavior which used to use A3 when maximum paper size is assigned in Scan/VRS Profile, is enhanced. MFP now queries the device for the largest supported paper size, and uses that size.

MFP Model/SDK Support Update

TotalAgility 7.5.0 supports the following MFP SDK/Framework:

- Ricoh SmartSDK v2.40
- Xerox EIP 4.0 SDK

- HP OXPd 1.7.3 / FutureSmart 4
- Canon ScanFront 400

For individual supported models, refer to MFP Support section in CPCM.

Import and export MFP-specific settings

You can include device settings in the TotalAgility package and migrate them across development, test, and production environments without the need to manually configure them each time.

Capture Client

This section describes the new and enhanced features in Capture Client.

Toolbar configuration

You can configure Capture Client's toolbar through Form Designer's capture control properties.

A new tab, Configuration, is available, with options to configure main and image viewer toolbar.

If a button not enabled, the corresponding command is also disabled for that form. This means for disabled commands, the button is not available to the user via toolbar button, context menu, or hotkeys.

Lasso zoom image viewer mouse mode

Lasso zoom and Persistent Lasso zoom have been consolidated into a single toolbar button.

A single mouse click activates lasso zoom. Lasso zoom allows user to zoom to an area based on a mouse lasso action.

Double mouse click activates persistent lasso zoom. Persistent lasso zoom stays in that mode until user turns it off. When persistent lasso zoom is activated, there is red border around the toolbar button.

Refresh Capture Form action

Two new options are available for Refresh Capture Form action:

- Full Batch Reset: Instructs the action to refresh the entire batch structure, not just field values. This is useful when a context-aware SDK is used to make structural changes, such as delete, split, or merge document. After such action, Refresh Capture Form with full batch reset should be used so the updated batch structure is displayed in the UI.
- Treat All Refreshed Fields as Complete: Instructs the action to refresh field values without marking it as "dirty". This is useful when a context-aware SDK is used to make field value updates that should be treated as final, without the field being sent through validation again when user confirms some field on the document. For example, using SDK to show a custom error description. Using this feature will ensure the error message does not revert back to the default when user confirms any other field on the form.

Open Source document

A new function, Get Source File, is available that allows user to open the original document with the native app available on the local workstation.

Function accesses not the page image, but the document source file, so is available only on documents with a document source file, such as PDF, Word, Excel, and more.

Clicking the Get Source File button passes the file to the browser's built-in download manager.

This new function can be enabled or disabled through the new Capture Client Toolbar Configuration feature.

New theme styling

Capture Client has a new theme styling that adheres to the look and feel of TotalAgility 7.5.0. It provides a more modern styling, with some larger elements suitable for higher resolution monitors.

Note The layout spacing has changed as compared to previous versions of TotalAgility, so some layout adjustment may be required when importing forms from TotalAgility 7.4.0, or prior.

Alternatively, use Classic style to keep layout spacing exactly the same as TotalAgility 7.4.0, or prior.

The capture forms generated by the form builder now use relative width and height by default.

Context-aware SDK additions

The following SDK methods are now context aware.

- GetDocumentAsFile
- GetPageTextExtension
- RejectDocument
- RejectDocuments
- RejectPages

Chapter 3

Change in behavior

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

.NET Framework 4.7

TotalAgility supports .NET Framework 4.7.

Form_Referrer replaced document.referrer

As the document.referrer variable was not working in IE, it has been replaced with the Form_Referrer session variable. This variable works well in scenarios such as form cache enabled or disabled, or when redirecting back using the touch "Current View."

Table control: Modify button removed

When you add a Table control to a form, the Add option in Table properties is replaced with Add and Modify. The Modify button is removed at runtime.

Some form controls are shifted after upgrade

When the Button Only display property of the File Upload control is enabled, the control is displayed using the correct width for both the label and button. This behavior could change the layout of the forms after an upgrade to TotalAgility 7.5.0.

TotalAgility Linked server to use SDK services for communication

Any existing configured Linked Servers in the TotalAgility Designer must be manually updated to point to the web server URL, instead of the application server URL.

Draw Redaction button renamed

The Draw Redaction toolbar button on the Web Capture control is renamed as Draw Rectangle.

Simulation mode implemented in synchronous processing

In TotalAgility 7.4.0, synchronous processes did not run correctly in simulations. On running a simulation, an error appeared that the specified job was not found. In TotalAgility 7.5.0, the parent synchronous map is not allowed for simulation. However, the child synchronous map is allowed in synchronous map.

SQL DB script of TotalAgility updated

The main initialization SQL DB script of TotalAgility is updated to support all editions of SQL 2016, not just the Enterprise edition.

Analytics changes in TotalAgility

- The EXCEPTION_MAP column in the JOB table is changed to RAISED_BY. This column now holds:
 - 0: None, normal job
 - 1: Server Exception
 - 2: Process Exception
 - 3: Trigger
 - 4: Alert
 - 5: DocumentSet
- In TotalAgility 7.4.0, at runtime, TotalAgility flagged jobs that had overrun their costs only if an exception map was assigned. In TotalAgility 7.5.0, jobs are flagged regardless of an exception map.
- Every time a capture activity becomes pending, cancelled, completed or changes status from awaiting events to pending, TotalAgility records the document and page count.

MFP web services SDK developer guide title change

The *Kofax TotalAgility Web Services Connector SDK Developers Guide* has been renamed to *Kofax TotalAgility MFP Web Services Connector SDK Developers Guide*.

This name better reflects what this SDK is used for, as it is not used outside of MFP device integration.

Apply button for Canon ScanFront 400 MFPs

Each editable text field on the Index Fields page of Canon ScanFront 400 MFPs has an Apply button. Click the button to accept the new entry in the field.

Features deprecated or removed

The following features or requirements are deprecated or removed in TotalAgility 7.5.0.

Entity and Work Queue forms

Entity and Work Queue forms can no longer be generated automatically in the TotalAgility Form Designer. However, you can create a Work Queue form manually by adding a Work Queue control to a form, and an entity form by adding the Entity control.

Support for SharePoint 2010

SharePoint 2010 is no longer supported in TotalAgility.

LIVE_ACTIVITY.MACHINE_NAME database column

The LIVE_ACTIVITY.MACHINE_NAME column in the TotalAgility database is redundant and is removed.

You can get the machine name for a live activity by doing a JOIN on MACHINE_NAMES table using the LIVE_ACTIVITY.MACHINE_ID.

The same applies to the Simulator database.

Unused Report tables removed from the database scripts

The following reporting tables are removed from the TotalAgility scripts as the reporting feature no longer exists:

- REPORT
- REPORT_ACCESS
- REPORT_FIELD

JobService::GetSubJobId method

This method is deprecated in TotalAgility 7.5.0 as it is not intended for customers. It is currently only available on the SDK to support the legacy .NET wrappers.

CaptureDocumentService SDK methods

The following is the list of CaptureDocumentService SDK methods deprecated and replaced.

Deprecated methods	Replaced methods
ValidateDocumentWithType	ValidateDocument
ValidateFolderWithType	ValidateFolder
TestFieldFormatter	TestFieldFormatter2
FormatField	FormatField2
GetDocumentFieldAlternatives	GetDocumentFieldAlternatives2
CreateDocuments	CreateDocuments2
CreateDocument	CreateDocument3
CreateDocument2	CreateDocument3
UpdateDocumentTypeWithConfidence	UpdateDocumentTypeWithConfidence2

Work type removed from packages

You can no longer consume a work type in a package.

Requirement to restart the core worker service removed

You are no longer required to restart the CoreWorker Service after making changes to the Import Connector configuration.

HP OXPd 1.4 settings removed

HP OXPd 1.4 is not supported by Kofax TotalAgility 7.5.0. After upgrading from Kofax TotalAgility 7.4.0 to 7.5.0, the following settings for HP OXPd 1.4 are removed:

- mfp.oxpd1.4field.validation.lock.timeout
- mfp.port
- mfp.username

Text box: Color field type property removed

The Color field property of a text box is no longer available from TotalAgility 7.5.0.

Some custom forms dropped

The following custom forms are removed from the TotalAgility Workspace as the same functionality can be achieved in the TotalAgility Designer.

- **Administration:** Skins, Manage Skins, Bulk Skins Update, Maintain Checklists, Checklist Items, Checklist Templates, Manage Lookups, and Entity Instances.
- **Business Monitoring:** Business Events, Business Alerts and Business Targets.

Note By default, the updated Workspace menu is available after you install TotalAgility 7.5.0. However, after upgrading to TotalAgility 7.5.0, the new Workspace menu only appears if you import the Workspace package with the updated menu.

Control height removed from certain controls

The height property is removed from both the quick properties panel and advanced properties of basic controls. The height of basic controls is automatically adjusted based on the font used. You need not set a specific height. On percentage width forms, the Use Viewport Height option is also removed from each control.

Features scheduled to be deprecated or removed

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

Group resource: Skill level and security level

You will not be able to set the skill level and security level for a group.

Role: Skill level and security level

You will not be able to set the skill levels and security level for a role.

Virtual folders

Virtual folders within a case definition will no longer be supported.

Import: Using an XML file

You will not be able to import a business event, alert, target or work allocation rule using an XML file. You would only be able to import them using a ZIP.

Document conversion in Image Processing activity

Document conversion in Image Processing activity will no longer be supported. The sole purpose of Image Processing activity is going to be Image Perfection, that is, VRS.

All existing process maps will continue to work while upgrading to new versions as they used to. However, we recommend that you use the Document Conversion activity for document conversion purposes, particularly for converting files to the TIFF format, for any new processes and migrate to it in existing processes.

In case of a document conversion issue in today's Image Processing activity, a map redesign would be needed to incorporate the new node.

Forms: Load image from store

You will no longer be able to type in an image name (used for quickly providing an image) when you load an image from the store.

Touch events

You will not be able to use the Touchstart, touchmove, touchend events on touch controls.

Business Monitoring: Targets

You will no longer be able to create targets.

Entities

The Entities feature will not be supported.

Support for Internet Explorer 11

TotalAgility Designer will not be supported in Internet Explorer 11. However, the TotalAgility Workspace and forms will still be supported in Internet Explorer 11.

Chapter 4

Resolved issues

This chapter describes issues that are resolved in Kofax TotalAgility 7.5.0.

Redirect action issue

When the Redirect Popup action was placed as first action on a validation form, the form stopped loading. (1140330)

Email activity issue

When specifying the sender of the email using the Email activity, the activity failed to validate the email with first name and last name, and generated the "email address is invalid" error. (1138541)

Export Connector configuration files were not updated

The Configuration Utility did not update the database connection string in the following configuration files:

```
\\TotalAgility\Agility.Server.Web\bin  
\Agility.Server.ExportConnector.exe.config and \\TotalAgility\ExportConnectors  
\bin\RegAscSc.exe.config (1138501)
```

sessionInfo.SessionId error

When a form with a text box (field type as Date) or calendar control was browsed directly without logging in to TotalAgility, the "String argument is empty Parameter name: sessionInfo.SessionId" error appeared after clicking OK on the Session Timeout Alert message. (1136522)

Notification for a subjob activity did not work

When a process map that was using activity notification for an ordinary activity was called via CreateSubJob activity, the activity notification was not sent when variables with underscore character were used. Also no "SYSTEM Process Email Activity" instance was created when the subjob reached the ordinary activity. (1135288)

sessionState.referrer property overwritten

When a new form was opened in a new window, the sessionState.referrer property on the original form was overwritten and reset to blank. This caused a Redirect to Origin action not to work correctly. (1135196)

Job upgrade issue

On upgrading to TotalAgility 7.5.0, the system only upgraded jobs with Active status instead of upgrading all live jobs. (1134788)

Installer restart issue

For an on-premise multi-tenant Web-Application Server installation, when you provided invalid server location in the Choose Server Location With Options box and then clicked the next button, `Not able to communicate to the application Server` message appeared. When you clicked the Back button and fixed the server location value and then clicked the Next button, the installation did not progress. You had to restart the installer or press the Back button for the changes to work. (1132719)

Web-Application Server installation failed

For an on-premise multi-tenant Web Application server installation, the Application Server was installed correctly, but the Web Server installation failed with the following error: `Not able to communicate with the app server`. The installation failed because, the TotalAgility installer was incorrectly trying to validate the connection between the Web server and Application server as HTTP instead of using HTTPS. (1132716)

Incorrect documentation

Documentation of EWS and IMAP input source types referred to an incorrect application. (1131777)

Shared mailbox access issue

TotalAgility was not able to access a shared mailbox using EWS. (1121666)

Issue when mapping a Dynamic Complex variable

In a KAPOW activity, when the top level dynamic complex variables were only mapped without mapping any columns, the return values were padded with extra 0 between each parameter. (1120625)

KAPOW Robot name blank

When a process configured with a KAPOW activity was saved and released, the robot name was blank upon reopening the process. (1120621)

Incorrect syntax error

When a business process was changed to a case process, the job upgrade failed with the database error. (1120243)

Issue with reject notification to the originator

It was not possible to send notification mails only to the originator, as the notification recipient list could not be left empty. (1120021)

Looping in a business rule failed

When a document object was passed to a business rule that tried to loop through the fields of the document (Document.Fields), the Loop activity failed with the following error:

```
Failed to execute loop. Error: Unable to cast object of type  
'Agility.Server.Core.Model.Capture.RuntimeFieldDataCollection' to type  
'System.Object[,]'. (1119385)
```

Error in upgrade script

When the Business_Process table had a row where the Version value was "1000.000" or greater, the script failed with the following error:

```
Msg 8115, Level 16, State 8, Server RWVKTAD6\IDMSSCAN, Line 36 Arithmetic  
overflow error converting decimal to data type numeric. (1118718)
```

Items missing in Theme/CSS tab

If a CSS file had comments, TotalAgility did not show the CSS component after the comment in Theme manager CSS drop-down. (1118358)

Conflict due to non-unique GUID

The Document Creation activity in the business rule did not create a unique GUID each time when the document template was loaded from the store. Due to this, the following error message appeared because the ID was used by another process: `The process cannot access the file 'c:\ProgramData\Kofax\TotalAgility\Generated Documents*.docx'.` (1116712)

Drop down box issue

On upgrading to TotalAgility 7.5.0, if the Display Mode for a drop-down box was set to Text and Value, then the items were not auto populated. (1113067)

Access denied when calling a web service

To call a Web Service, if the logged in user was not in the Access Permissions - Server Settings list with appropriate permissions, the following message appeared:

```
Access denied. You must have at least ReadOnly access permission on
MaintainServer. If you need technical assistance, reference action:
WebService1. (1113006)
```

Issue when mini viewer was left aligned

When the mini viewer was left aligned and the % Width was used, the width of the capture text field was calculated incorrectly. (1111696)

Notification issue with sequential resource access

When an ordinary activity was configured with sequential resource access and activity notifications enabled, the notification was only sent to the first resource in the sequence. When the activity became pending for the first resource, an email notification was sent. Once this was completed and moved on to the next resource in the sequence, the second resource did not receive email notification. (1111093)

Some SDK methods when called from .NET activity did not write to the AUDIT_LOG

The following SDK methods did not write to the AUDIT_LOG table when called from the .NET activity: AddWorkerGroupResource, AddWorkerResource2 and RemoveResourceFromGroup. (1110919)

Issue when the trigger map was called from a subjob

When creating a job by calling the trigger map from a subjob, the trigger initialization parameter 'pSUBJOBID' was not getting populated with the subjob ID, and remained blank, when checked in the job variables. (1110829)

Issues with a job that used parallel paths and branching rules

In a job that used parallel paths and branching rules, the job went into a Ready For Evaluation state, certain paths failed to progress, and manual activities were suspended. (1110645)

Issue calling AddWorkerGroupResourceMember from .NET activity

When calling AddWorkerGroupResourceMember from a .NET activity, the resource was not getting logged to the AUDIT_LOG table. (1110241)

Issue with restarting a completed job at a node in an embedded process

Restarting a completed job at a node in an embedded process caused the restarted node to execute multiple times. (1106534)

Currency, decimal and float variables not saved correctly at job initialization in German locale

Using the German locale, process variables which were set as decimal, currency and float were converted or saved incorrectly to the process. However, changing to English locale and using "." as separator worked correctly. (1103961)

Issue with decision node as first node in process

When there were multiple resources within the XML resource, some of the subjobs did not progress and the decision node did not become active due to timing issue. However, the problem was resolved by adding a Synchronization node before the decision node in the SubJob map. (1103850)

License Server Only Wizard installation fails on Windows server 2016

When trying to install License Server only on a Windows Server 2016 Standard server by running Setup.exe from \\TotalAgility\TotalAgilityInstall, the setup failed with an error about missing IIS components. (1103247)

No text in message box from type alert

When using a message box from type alert on a pop-up form where the user was redirected to from another document form, the Message box did not contain any text. (1101568)

AD sync ignored the resource extensions

When using AD sync to import resources, the resource extension record was not created automatically in the ENTITY_INSTANCE table. (1101337)

TRIM integration issue

The dataset ID was missing on upgrade. If added manually, the following error appeared:

```
Object Reference not set to an instance of an object. (1100711)
```

TRIM Add Document node failed with String argument empty error

On creating a job based on a process that had a TRIM Add Document node where the Document Title accepted a string variable value, the job suspended at the TRIM Add Document node and reported an error.(1099375)

Issue mapping variables in JobVariableInfo node on upgrade

A String variable could not be mapped to a System variable in jobVariableInfo node. The job did progress at runtime as the node completed, however, the values could not be passed to the mapped variable resulting in the job suspending further down in the process flow. (1099372)

Issue with Update Row form action on capture table index field

The Update Row action did not work on capture table index field. For example, when the Update Row action was used to populate value from text box to certain column of the select row of capture table index field, a normal (non-capture) table could be updated successfully but a capture table could not be updated. (1099367)

Installation error on database step

While installing TotalAgility using a non-default SQL port, the installation could not be completed or failed, if a space was found before the comma and the port in the SQL server name.(1098855)

Error after importing language pack

After a modified language pack (.resx), such as PT was imported, it conflicted with the internal lower case code pt; it tried to add "pt" to the language column which conflicted with the imported PT language.

This resulted in the following database error:

```
Type : System.Data.SqlClient.SqlException, System.Data, Version=4.0.0.0, Culture=neutral, PublicKeyToken=b77a5c561934e089
Message : Violation of PRIMARY KEY constraint 'PK_UI_LOCALISATION'.
Cannot insert duplicate key in object 'dbo.UI_LOCALISATION'.
```

(1097812)

Expected duration for job ignored business calendar when creating a job from skin

If tomorrow was set to a non-working day and the expected duration to one day, the expected duration of the job from the skin showed tomorrow instead of the day after tomorrow. (1097661)

Expected duration for job ignored when creating a job from a skin

When a job was created on a skin, it did not take expected duration into consideration, when the duration was specified in the properties of the skin. The skin inherited the expected duration value of the parent. If this value was changed it was not reflected at runtime. (1097655)

Issue with an advanced property of File Upload control

Every time you released a capture form, the Allowed/Restricted File Type setting set in the Advanced properties of a File Upload control was not saved. This issue also occurred even if you typed in a file extension, closed the extended properties, clicked on another control or field, and then went back to the extended properties of the File Upload control. (1097258)

Tab control display issue

When the form cache was on and if you accessed the form which contained tab control for the second time, the last tab was displayed as default. (1097212)

Issue using specific variables in an Expression action

When using some reserved words for variable names and then using those variables in an Expression action, an error occurred.(1096670)

Complex variable value not being updated in a subjob after upgrade

Where a process was called as a subjob, at the start of the subjob the complex and dynamic complex variables were not picking up the values for mapped members. Therefore, the values for those variables were being overwritten in the job based on that process. (1091639)

Issue converting forms from fixed to percentage width

When the width of a form was converted from fixed to percentage, all controls were also automatically set to percentage, except for cells that resided inside a tab control. (1091343)

TotalAgility federated security failing with PING identity

This issue is duplicate of Bug 1079981. (1082402)

TotalAgility configuration tool - baseaddresses setting

When setting the authentication to "HTTP with Windows authentication" or "HTTPS with Windows authentication", the "baseaddresses" setting in Agility.Server.StreamingService.exe.config file was not getting updated. (1080129)

Federated security - SAML response could not be handled by TotalAgility

The identity provider OKTA used the "Single Sign on URL" property instead of SAMLRequest.AssertionConsumerServiceURL that TotalAgility provided. As a result, TotalAgility was not receiving the query string containing the provider ID, protocol and origin in the response from OKTA and threw an error. Also, the SAML standard did not specify that providers should always use AssertionConsumerServiceURL to reply back (it was marked as optional). (1079981)

TotalAgility configuration tool - CEBPM settings

When updating the database connection in Kofax Configuration utility, the CEBPM settings in the ServerData table were not getting updated. (1079804)

Global variable change not used in new session

On importing a package containing a form that was using a global variable to update some fields, into another environment, changes made to the global variable were not getting picked up in the form even if you logged out and logged in. (1078622)

Message header missing in output files

When the option to include the message header was configured for a mailbox, the message header was not included in an output file. (1076846)

Error on Redirect action with initialization variable having double-byte Japanese character

The following error occurred on a redirect pop-up form when specifying double-byte Japanese character for initialization variable: `Uncaught URIError : URI malformed. (1076740)`

Issue with selection changed actions

The Selection changed actions were not fired after clearing a radio button list and selecting the same option. (1076673)

Documentation missing for saving import settings

There was no documentation to identify whether the modified import settings were saved or not. (1076321)

Issue when saving a resource

When resource extensions were in use and the resource who last modified the resource you were trying to save no longer existed, the following error occurred:

`Entity Instance already exists. (1076026)`

Business Rule failing to consume XML string

If an XML string was used in a business rule, the rule could not be executed. (1074644)

Core Worker Service issue when a jp2 file was imported

Core Worker Service stopped working when importing an email having jp2 file type as an attachment. (1062993)

Resource groups inheritance for extraction group

There was an issue with the inherited properties of nested document types when the parent's properties were amended. (1059855)

Issue with Click events in TotalAgility 7.4.0

Click events did not work for TotalAgility 7.4 (Ext JS 6.2.1) in Firefox 52 and above. (1058134)

Business Rule failing after upgrade

After upgrading to TotalAgility 7.3.0, a number of jobs failed at runtime and reported errors.(1057178)

Limitation of the database field for the federated security/SAML Certificate data

The Certificate data of the database field for the federated security/SAML in TotalAgility had a limitation of 2,000 characters. As a result, the Provider could not be added to the configuration. (1057115)

Issue with package import

Package import did not assign Extraction or Classification groups to Default Category, if a category with the same name but a different ID existed on the target environment. (1056999)

Additional documentation for archiving feature

Additional information for archiving feature was required in documentation. (982504)

Problem with Oracle stored procedures

On upgrade, none of the stored procedure nodes had quotes around the stored procedures but TotalAgility placed quotes for any newly added stored procedure. (981150)

Error on skinned case

In a skinned case, when the Override Process property was set to Yes and an Embedded Process node had an associated state change, an error occurred at runtime. (980931)

Database error when adding a new .NET node

A database error occurred when adding a new .NET node (referencing a custom dll) to a map that had an existing .NET node (referencing a custom dll) because the dll reference path was case sensitive. (979587)

Port number not included in URL generated in email for ResetPassword

Whenever a TotalAgility user selected the "Forgot Password?" link at the logon screen, a screen appeared for them to provide the TotalAgility registered email address for a password link to be sent. But when that email was received, the URL contained in the link did not include the web server port address. As a result, if non-standard port numbers were used for the TotalAgility installation, the link failed. (979360)

Issue with ResourceService - GetSubordinates2 method

The filter parameter that would restrict the returns to only specific managerial level was ignored. (978516)

Unable to open a process with an invalid State event from TotalAgility 7.0.2 onwards

After upgrading to TotalAgility 7.3.0, a process map could not be opened. The following error was reported on opening the process:

```
Error Unable to update the same as previous activity information.
```

On clicking OK, the map did not load and only a blank page was displayed. (978215)

Deselected action in control event is still enabled

When you deselected one of the actions on a control event and saved it. On reopening, the action was still checked in the event even though it was deselected. (980376)

Issue using X-Frames when accessing a window object across domains

Using X-Frames when accessing Windows object does not work across domains. (977910)

Date in date table column were not being formatted correctly

In scenarios such as Work Queue form with or without a Work Type associated, or returning a date from a Date table column from a DB Query or .NET action, date in the Date column did not appear in a correct format. For example, the date appeared as "Tue Mar 24 2015 21:00:00 GMT-0300" instead of "dd/mm/yyyy hh:mm:ss". (976956)

Issue using long description for OU

In the TotalAgility database, the table CATEGORY has data type nchar(60) for column DESCRIPTION. TotalAgility did not truncate the description of a category when adding the category to the database. So when synchronizing an OU with a description longer than 60 characters, the database driver threw the following error:

```
String or binary data would be truncated. Statement has been terminated.  
(976455)
```

Error when archiving a job

If you deleted a process version associated with a subjob which was a part of finished job, the following error occurred on archiving the job:

```
Object cannot be cast from DBNull to other types error when archiving a job.  
(975790)
```

TWAIN flatbed scanning issue

The VRS TWAIN driver did not support scanning maximum paper size from flatbed. (975238)

Note It was an environmental issue.

Issue using CreateJobInCaseAndProgress for creating a job from a skin

When using CreateJobInCaseAndProgress to create a job from a skin, the target due date and target duration set in the manual activity were not considered. (974746)

Could not delete business rule

After adding a standard validation rule to a folder type, a business rule could not be deleted, and threw an error. To resolve this issue, you must first need to delete the standard validation rule before deleting the business rule. (973772)

Issue with capture field mapping in form action

When an action was created that consumed the form variable with an identical name to extraction group field, the mapping was lost after closing the action. The issue did not occur if a form variable with different name than that of extraction group field was used. (973026)

Untranslated help text for HP

The password field for split login had a new help screen, but it was only available in English. (970424)

Setting Cell width over 100% will cause IE to crash.

When setting the width of a cell on a form to more than 100%, the Designer does not respond in Internet Explorer. (965464)

Issue with background image of a form

The background image of a form was not displayed at runtime. (965242)

Issue with values when the RowSelected event was fired on a capture table

Wrong values displayed on IE 11 browser and correct values in Chrome and Firefox, when the RowSelected event was fired on a capture table where two rows were selected. (963105)

Issue with CreateJobSyncWithDocument(s)

CreateJobSyncWithDocument(s) with 'ReturnAllFields=true' parameter returned an exception if there was a table field. And, when 'ReturnAllFields=false', but specific (non-table) fields were listed in the 'FieldsToReturn' property, it returned a different exception. (961741)

Generated Assemblies folder was not deleted

After applying the service pack on TotalAgility that had Web and App tiers on separate machines, an error occurred on executing a Business Rule action, as the generated assemblies folder was not cleared. (961434)

Issue with SharePoint Communicator installation

The installation of SharePoint Communicator failed, if the Default Web Site did not exist in IIS. (959255)

Issue with deleted role

After deleting a role from a process, the deleted role was still listed in the 'Associated Groups' for the resource (959117)

Unable to map the stored procedure output to Capture Combobox field

In design time, it was not possible to map the output of a stored procedure to a Capture Combobox field. (958633)

Issue with UpdateWorkerResource2 call

The "Value cannot be null" error occurred when only the resource ID was passed in UpdateWorkerResource2 call. (958472)

Email address field wiped off when calling UpdateWorkerResource2

When both resource ID and resource name in the resource identity parameters of the API call were mapped, after the call completed the email address field of the affected resources was wiped off. (958137)

Automatic update for dictionaries not working

The dictionaries were not updated automatically at the start of each new batch when processed by Server, or opened in Validation, or Correction. This resulted in loss of most recent information being used to process and validate documents. (955841)

Issue with Document Review and Validation activities

The Document Review and Validation activities could complete even though the mandatory drop-down field was not set. (955728)

Issue with RaiseEvent()

The RaiseEvent() method was throwing an error when called for a job that had more than 32767 instances of the event registered against it. No jobs in production were progressing past certain nodes that were "awaiting events". (922375)

Issue with security tokens when importing package

When the package was imported, the security token got associated with the Default Category, and not the category it was actually associated with. You must move the token to the correct category after importing the package. (921945)

Error using an apostrophe (') character in regular expression

If an apostrophe (') is used in a regular expression, the following error occurred at runtime:

Error: JSMIN unterminated string literal: 10\n with apostrophe in RegEx.

This error did not occur in design time. (921891)

Issue with manually archiving large amounts of jobs

Archiving the finished jobs from System settings manually resulted in a transaction timeout. (913204)

Error when multiple threads try to save an assembly from the store to the hard disk

When multiple threads tried to save the assembly from the store to the hard disk, one or more jobs were suspended. (912733)

Unexpected results when overriding color mode on Lexmark Android MFPs

If a Device Scan/VRS profile is associated with a shortcut on a Lexmark Android MFP, any images sent by the MFP are converted based on the color depth and resolution settings defined in the Device Scan/VRS profile. This is because when a Device Scan/VRS profile is assigned, TotalAgility performs image processing on the server after receiving the images from MFP. (912438)

Note This behavior is as designed, and the help describes how this setting works.

Associated job was incorrect for Capture-enabled process

When a job was created on a capture-enabled process from the associated jobs for a case definition, the Scan Create New Job form appeared instead of an error. (912282)

Need to wait for scan job to complete before starting a new task

When using a Lexmark cSF Client on a MFP Scan Create New Job form, setting Upload and Progress Job to enabled allows a new scan job to start before the current job finishes uploading the images to the server. During the image uploading phase of the job, a spinning icon appears on the MFP front panel, this icon remains until the entire job is sent to the server. You can either wait for the job to complete before starting a new task, or return to the home screen, log back in, and start a new job. This previous job will still complete. (912004)

Note The Upload and Progress Job setting only applies to MFP Scan Create New Job forms, not other MFP forms such as MFP Scan Activity form.

This behavior is by design.

Error when scanning with a Device Create New Job form

When you scanned with a Device Create New Job form which contained hyphen (-) in its name, the following error occurred:

"Method 'Kofax.EventsExecutor.onSaveFieldChanges_[DCNJ_form_title]_Batch1' not found" (911994)

HP OXPd 1.4 deprecation

Kofax TotalAgility no longer supports HP OXPd 1.4, which has been deprecated by HP. (911470)

Import Connector installation failed

When TotalAgility was installed from a read-only network share, the Import Connector was not installed successfully. (911223)

Issue with GetActivities2 API

The GetActivities2 API always returned "0-Script" for the Activity Type return parameter for all activities. (911140)

Forms performance: static JavaScript and images private cache header

The cache-control header for static TotalAgility files indicated a low caching expiry and the caching was set to 'private' as a dynamic response. This impacted the proxy cache negatively, as the private files were not cached. The cache control is now set to public and maximum size to seven days. (907258)

Lexmark eSF client was unresponsive after stopping IIS

If a user pressed Scan when IIS was stopped, the eSF application was unresponsive and the Return and Home buttons did not work. There was no error message. (907167)

Focus on incorrect field after error on Konica Minolta

When you dismissed a field validation error on Konica Minolta MFPs, the focus was on the previously edited field even if it contained valid data. This was a part of the Konica Minolta interface. (897381)

Unable to connect Xerox MFPs

When the IIS server is restarted, Xerox MFPs cannot connect to the Kofax TotalAgility server. The following error occurs: "HTTP error 404. The requested resource is not found." This is a known response of the Xerox SDK platform. To reconnect to the Kofax TotalAgility server, press **Clear All** on the device. (896449)

Slowdown on Ricoh MFPs

The apache4 setting was implemented for http_client to resolve performance issues with these Apache setting on Ricoh MFPs prioritizes the memory footprint to reduce issues with these Ricoh models: 2554 (12x), 3003 (11x), 4002 (10x), and 2550 (4x). (890090)

Case Worker form does not load on an upgraded environment

When you upgrade to latest version of TotalAgility, the Case Worker form does not load. To get the Case Worker form, you must import the latest TotalAgility Workspace package. (887541)

Negative amount issue on default amount formatter

The Thousands separator option caused the negative sign to be removed from negative value (any value between -1 and 0). (887334)

Connection issue

You could not connect to an IMAP mailbox if the Processed Folder contained a space in its name. (882082)

Session ID issue

If the session ID is not mapped to the Web Capture control, the control looks for a specific global variable for the session ID. (836539)

Note This behavior of control is as designed.

Issue with TakeActivity method

Mapping variable type short in output job variable returns error when called from a process. (761512)

Chrome browser unresponsive on iPhone 4S and iPad

When closing the pop-up window on an iPhone and iPad, that uses the older version of Chrome (such as 44), the Chrome browser crashed.(642318)

Chapter 5

Known issues

This chapter describes issues that you may encounter while using TotalAgility 7.5.0 and provides workaround, as applicable.

Issue with Reporting upgrade

Prior to upgrading, Reporting should finish processing existing messages. All the messages from client modules are stored in `wsa_messages` table of the Reporting staging database. In on-premise, the default database name is `TotalAgility_Reporting_Staging`. In on-premise multi-tenant environment, the database name is the same as TotalAgility database name, such as `TotalAgility_user1`. Once all the messages are processed, `SELECT COUNT(*) from wsa_messages` should return 0 records. Then it is possible to proceed with Reporting upgrade. If during upgrade, existing Reporting is still running, Extract -Transform-Load operations for existing data unpacked from `wsa_messages` table will first finish the cycle, and then it will allow setup to proceed. (1158909)

DPI resolution not displayed on Canon MFPs

When opening the Settings button on certain Canon MFP models, the DPI resolution is not displayed. The job can still be scanned and completed, but the displayed DPI resolution is incorrect. This has been detected with Canon SE models, including 3325, 3530i, and 4525i. (1156385)

Workaround: In TotalAgility Designer, configure the Scan/VRS profile to set the resolution and under **Allow Runtime Editing**, set **Resolution** to **No**.

GetWindowsUser() returns app pool user in a distributed system

When `GetWindowsUser()` is called in a single-machine installation, it returns the logged on user correctly but when called in a distributed installation (separate web and app server), it returns the app pool user. (1155764)

Workaround: Call the API only from custom web pages. The API is not supported from Form actions (as they always run on the app server and do not have access to the calling Windows user.)

Flatbed scanning not resumed if stopped on Ricoh Android MFPs

When using flatbed as a paper source on Ricoh Android MFPs, scanning is not resumed if scanning is stopped. At the Stop on Scanning window, tapping Continue leaves the indicator spinning with no progress taking place. (1155319)

Workaround: Tap **Cancel** to end the scanning and then the back button to return to the Kofax main menu. Select another shortcut and log back in when prompted.

Unexpected warning message is displayed while job is being scanned on Canon ScanFront MFPs

When scanning on Canon ScanFront 400 MFPs, the following error occurs, "Parameters are not valid. Change parameters." This occurs with web application version 3.3.1803.2302. (1154501)

Workaround: Click **Cancel** and then **Add more pages** to continue scanning.

Issue with Radio Button control with no default settings

Radio button control with no default selection set at design time retains the last selected option between documents. (1153497)

Workaround: Select a different radio button option and then select the previous option (if that is the desired option).

Unable to assign a string multiple times in a process Expression node

When using a process Expression node to update the value of a work type process variable, if you update the same work type parameter more than once in the same expression, the job suspends with the following error: Database error occurred. Contact your administrator. (1152391)

Workaround: Use a business rule expression or use multiple process expression nodes.

Association with document sets not exposed to process map

If you try to delete or export a process map and if any document sets are associated with it, the following error is displayed when creating a TotalAgility package: Unable to find any released version of this map. (1152375)

Workaround: Identify the missing component (Document Set in this case) and remove the reference in the process map.

HP FutureSmart 4 MFPs display empty screen after fixing paper jam

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

Workaround: After fixing the paper jam, do one of the following depending on what you to do with the job:

- To cancel the job, press **Cancel** and then press **Exit** immediately to close the Message Center window.
- To continue with the job, wait for the scanning to complete and when the Complete window appears, press **Done** and then press **Exit** immediately to close the Message Center window.

If you do get the Kofax window, press **Home** to exit the Kofax app and return to the HP main menu.

The DeleteJobNote method does not take milliseconds into account

When job notes are created by an automatic process (and so multiple notes can be created within the same second), the DeleteJobNote method of the Job Service appears to ignore the milliseconds of the job note CREATION_DATE.

Consequently all notes created within the same second are deleted if a single note is selected for deletion. (1150260)

CreateJobWithDocumentAndProgress accepts the Limited User Session ID

The SDK method CreateJobWithDocumentAndProgress accepts the Limited User Session ID when it should not. (1149238)

Scan settings not returned as updated values on Lexmark cSF MFPs

If you open the scan settings for a shortcut and change the DPI and color settings for a Lexmark cSF MFP, the changed settings are not used with the device. The default values of the assigned Scan/VRS profile are used instead. (1148964)

Workaround: In the Scan/VRS profile assigned to the MFPScan form, set **EVRS Settings Only** to **Yes** and remove any settings in the **EVRS Settings** field for DPI and color mode.

Sharepoint custom pages integration and security

The SharePoint integration section on TotalAgility custom Web pages in TotalAgility installation guide is outdated.

The following instructions are given in the guide:

“When implementing these forms, SharePoint passes the "LOGON_USER" variable into the embedded TotalAgility forms to call the TotalAgility API "UserService::GetSessionId()". Firstly, the method does not exist or is misspelt. GetSession() does exist but, this is not a secure method as it allows users to get a sessionId by just knowing the URL and a valid username and without requiring a password. This is a security risk.

The documentation should describe how to enable SSO using a secure logon methods, such as, LogonWithWindowsAuthentication2 and full steps required to configure it. (1148703)

Workaround: Try using the following procedure:

- Enable SSO (with system setting “Disable logon without password” = No)
- Create a form called SSOLogon (no navigation or header) with 2 onload actions 1: LogonWithWindowsAuthentication2 and 2: redirect to general work queue.
- On SP quick links, use display name Work queue and link `/_layouts/WorkQueue.aspx?EmbeddedForm=SSOLogon.form`

API's limited user session ID support

The following API methods do not support Limited User Session ID:

- JobService.CreateJobSync
- JobService.CreateJobUsingProcessType

When the methods with Limited User Session ID in the session ID field are called, the `Access Denied` error is displayed. (1143015)

TotalAgility Documentation: Missing information in Prerequisites Guide regarding MSDTC

MSDTC information is missing in the Prerequisites Guide. It does not mention what is required for MSDTC and split databases.

The Installation guide does not include detailed information about MSDTC. For example, if MSDTC is enabled (required for split Archive and main DBs) it's required on APP and DB servers, same authentication mode, and for remote clients. (1143002)

Issue with drop-down control for table

A drop-down control for inline table editing in touch forms does not function correctly. (1140783)

Issue logging in with 'Change Password on Next Logon' set to Yes

If 'Change Password at Next Logon' is set to Yes; when you log on to the workspace, the application prompts you to change your password.

If the User Session timeout intervals are updated in the Designer>System Settings while you are still logged in to the Workspace and the TotalAgility Services/IIS are not restarted, then you will be asked to change your password again when you log out of the workspace, and log in again. (1140715)

Mini-viewer overlaps capture text field on Document form

Mini-viewer overlaps capture text field on an upgraded document form. (1134469)

Workaround: Adjust the height of your capture multiline fields and make them larger, if they are currently set to 22 or below.

Cannot update an existing Job Note

You cannot update an existing Job Note for a completed or terminated job. (1133988)

Issue deleting rows

For the phone and tablet forms on the iOS devices, you can delete the first row in a table only in the first instance. If you try to delete the first row in the second instance, the row is not deleted. (1130485)

Workaround: Double-click the first row to delete.

Forms display issues

When the "Content Only" setting is enabled for menu items for form navigation, and you navigate between those items, the content is not displayed properly. (1120227)

Timing issue when clearing capture text fields

On a validation form, it is not possible to clear the capture text fields even if the text boxes are empty, and the SamePage action is executed after the Clear action. (1120070)

Workaround:Add **SaveChanges** action before the AddRow action.

Updated Storage Path displayed incorrectly

If you update the value for a Storage Path (for example, XML or custom file Storage folder) when importing the package that is mapped to XML connector, the new value is displayed incorrectly in the KEC-XML Setup form. (1119284)

Webservice XSD file issue

In the WSDL file, the XSD file is referring to the external DocumentService.xsd using a relative location, but when the XSD file is in the same location as the WSDL file, TotalAgility does not resolve the WSDL file. (1109086)

Workaround:Update the XSD location in WSDL file to specify an explicit path.

Unable to import the German language pack

When importing the German language pack, the translation of the form, JobDetailsProperties.form does not take effect directly after the import. (1080994)

Workaround:Navigate to Form Designer > Translation > JobDetailsProperties.form and click Save without making any changes. The translation becomes active.

Image snippet incorrectly displayed in mini-viewer

The height of the mini-viewer box appears correctly at runtime, but the actual snippet displayed inside the mini-viewer takes the height from the associated capture text box instead of the mini-viewer. As a result, the image snippet does not fit inside the mini-viewer box correctly. (1076542)

Workaround: Adjust the height of your capture text box and make them larger, so that the image snippet fills in the control height specified in the document form.

Issue on restarting a completed job

When a job completes or terminates, the Core Worker moves the job to archive database through a worker task. If the worker task was running and someone restarts a job at the same time, an orphan activity will be left in the live tables and the job is archived. (1075013)

Error when scanning with Black and White color setting after using color

An error appears when using the Black and White setting without image enhancements and then scanning using the Color setting. (1060046)

Navigation menu collapses on touch enabled devices

When using a device that has a touch screen and a mouse, menus collapse when the cursor is moved. (1057810)

Workaround: Modify the "kofax-ext-fixes.js" file by commenting out line 796. Reference line 796:
`"wrapper.on('touchmove', this.collapseMenu, this);"`

Error when mapping Nullable oracle table field to DAS

When mapping "Nullable" oracle table field to DAS, an empty field displays the following message: "please specify values for all fields/parameters" (1057361)

Workaround: Use an SP. Pass the date as a string in SP and then use the TO_TIMESTAMP function to convert the string into the timestamp.

Decision node validation issue

When using fields from extraction group and checking to see if fields have values using a decision node, the decision node validation validates illegal sentences. (979406)

Error when archiving a job with a large history

When archiving a job with a large history, the following error occurs:

The operation is not valid for the state of the transaction. (977100)

Business rule fails

When you test a business rule that contains a Dynamic Complex Variable as a business rule output, the rule fails with an error. (974128)

Resizing columns in Devices corrupts table formats

When resizing columns in tables in the Devices app, the column width compresses so that the text is not readable. Table columns should be left at their original width. (973609)

Issue when using a Script activity

When accessing SDK Objects in VB.NET using the Script activity, an error occurs. (963425)

Workaround: Add `Agility.Server.Core.Model` to .NET Assemblies in the Integration module in TotalAgility Designer and import the reference in the VB script.

Display rule issue

The order that form actions execute combined with timing sometimes causes display rules not to run. This is an intermittent issue that occurs on the mobile devices. (912288)

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

On the Lexmark eSF and Emulator, split login should display an error when you take the Scan activity from an embedded process, because the document or folder is not yet been created. Instead of a

descriptive error message, the application is unresponsive on the Lexmark eSF, or the user can scan, but a Web service exception appears when you click Send and Exit on the Emulator. (911996)

Workaround: Prior to selecting the Scan shortcut, select any personal shortcut and provide the correct password.

Issue when cookies or pop-up are not allowed

When you disable cookies or turn on the pop-up blocker in a browser, some features in Kofax TotalAgility may not work correctly. (911043)

Workaround: Enable cookies and disable the pop-up blocker for the TotalAgility site.

Dynamic complex variable pre-populated data stripped during import

If you use a pre-populated Dynamic Complex variable in the process map, on exporting the process package and then importing it into a new environment, the pre-populated data in the variable cells is stripped out. (898437)

Workaround: Use a Complex variable instead of Dynamic Complex variable.

Focus on incorrect field after error on Konica Minolta

When you dismiss a field validation error on Konica Minolta MFPs, the focus is on the previously edited field even if it contains valid data. (897381)

Database tables are not created

The TotalAgility databases are not created properly when the SQL account has special characters and spaces in the password. (868664)

Delete button is inconsistent on Lexmark cSF image preview

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 deletes that image. When the document is scanned from the ADF, pressing Delete cancels the entire job. (800873)