Kofax TotalAgility

Migration From Kofax Products
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KOFAX

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Preface

This document provides information about migrating the following Kofax products to Kofax TotalAgility:

- Kofax Capture and Kofax Transformation Modules
- Kofax Import Connector

Read this guide completely before starting the migration process.

Related documentation

The full documentation set for Kofax TotalAgility is available at the following.

https://docshield.kofax.com/Portal/Products/KTA/7.9.0-ud9cfx6hos/KTA.htm

In addition to this guide, the documentation set includes the following items:

- *Kofax TotalAgility Prerequisites Guide*: Provides system requirements for installing TotalAgility, instructions for running the prerequisite utility, and a software checklist for various installation types.
- *Kofax TotalAgility Installation Guide*: Describes how to install and configure TotalAgility.
- *Kofax TotalAgility Integration Server Installation Guide*: Describes how to install Kofax Integration Server and integrate it with other products.
- *Kofax TotalAgility On-Premise Multi-Tenant Installation Guide*: Describes how to install and configure On- Premise Multi-Tenant system.
- *Kofax TotalAgility Configuration Utility Guide*: Explains how to use the Configuration Utility to update settings across various configuration files for different types of installation and deployment.
- *Kofax TotalAgility Administrator's Guide*: Provides information to the administrator on configuring and maintaining a TotalAgility installation.
- *Kofax TotalAgility Architecture Guide*: Provides an overview of the TotalAgility architecture, covering various deployments for on-premise, on-premise multi-tenancy and Azure environments.
- *Kofax TotalAgility Best Practices Guide*: Describes the best practices you must follow when using TotalAgility to improve performance, cost, maintenance, availability and security.
- *Kofax TotalAgility Features Guide*: Provides an overview of the TotalAgility features.
- *Kofax TotalAgility Migration Guide*: Provides information on TotalAgility upgrades from different versions and post upgrade configuration.
- *Kofax TotalAgility Help*: Provides details about using TotalAgility to design business jobs and cases, assign resources, create forms, integrate with external applications, and more. Access the help from the TotalAgility application by clicking the Help button.
- *Kofax TotalAgility Workspace Help*: Describes how to use the Workspace to manage activities, jobs, and resources. Access the help from the TotalAgility Workspace by clicking the Help button.
- *Kofax TotalAgility On-Premise Multi-Tenant System Help*: Describes how to create and manage tenants using the TotalAgility On-Premise Multi-Tenant system.

- *Kofax TotalAgility Web Capture Control Help* : Provides details on using a Web Capture control in creating multi-page documents, creating a new document in a new folder, deleting pages that have been incorrectly scanned, and more; also, describes the buttons available in a Web Capture control toolbar.
- *Kofax Analytics for TotalAgility Product Features Guide*: Provides an overview of the dashboards that help you track data through the workflow, analyze the effectiveness of the processes and resources, and address business problems.
- *Kofax TotalAgility Tables*: Describes the Kofax TotalAgility tables and fields used by Kofax Analytics for TotalAgility.

Training

Kofax offers both classroom and online training to help you make the most of your product. To learn more about training courses and schedules, visit the Kofax Education Portal on the Kofax website.

Getting help with Kofax products

The Kofax Knowledge Base repository contains articles that are updated on a regular basis to keep you informed about Kofax products. We encourage you to use the Knowledge Base to obtain answers to your product questions.

To access the Kofax Knowledge Base, go to the Kofax website and select **Support** on the home page.

> **Note** The Kofax Knowledge Base is optimized for use with Google Chrome, Mozilla Firefox or Microsoft Edge.

The Kofax Knowledge Base provides:
- Powerful search capabilities to help you quickly locate the information you need.

  Type your search terms or phrase into the **Search** box, and then click the search icon.
- Product information, configuration details and documentation, including release news.

  Scroll through the Kofax Knowledge Base home page to locate a product family. Then click a product family name to view a list of related articles. Please note that some product families require a valid Kofax Portal login to view related articles.
- Access to the Kofax Customer Portal (for eligible customers).

  Click the **Customer Support** link at the top of the page, and then click **Log in to the Customer Portal**.
- Access to the Kofax Partner Portal (for eligible partners).

  Click the **Partner Support** link at the top of the page, and then click **Log in to the Partner Portal**.
- Access to Kofax support commitments, lifecycle policies, electronic fulfillment details, and self-service tools.

  Scroll to the **General Support** section, click **Support Details**, and then select the appropriate tab.

Kofax Capture/Kofax Transformation Modules to TotalAgility

Use the Kofax TotalAgility KC/KTMConverter tool to convert your Kofax Capture CAB files and your Kofax Transformation Modules projects into the correct format so that they can be used in TotalAgility. This saves time because the project does not have to be recreated in TotalAgility.

Once the projects are converted, they can no longer be updated using this tool. This means that any changes made the to the Kofax Capture or Kofax Transformation Modules projects after conversion to Kofax TotalAgility are lost and must be recreated manually in Kofax TotalAgility. Because of this, it is important that you ensure all changes are contained within these projects before they are converted.

You have two options for converting the projects so they can be used in TotalAgility:

- Run the Converter tool using the Extraction Group and Classification Group with the validation rules and formatting.
- Use the Import function in Transformation Designer to get a Shared Project without the validation rules and formatting.

About TotalAgility and Transformation Designer

TotalAgility brings capture and transformation capabilities to business process management.

The TotalAgility Transformation Designer serves a function similar to that of the Kofax Transformation Modules Project Builder. Normally, project design starts in TotalAgility, and continues in the Transformation Designer to configure the capture related objects.

The Transformation Designer is also used to import Kofax Transformation Modules projects and convert them to a format that can be used in TotalAgility. The conversion process does not alter the original Kofax Transformation Modules project file.

KC/KTM Converter wizard

The converter wizard leads you through the following steps for converting a Kofax Capture and Kofax Transformation Modules project in the format needed by TotalAgility.

1. Connect to TotalAgility
2. Select file to import

3. Project category

4. Finish

Project category

Use this step in the wizard to specify a TotalAgility category for the project. You can also specify Extraction Group and Classification Group names.

The following options are available.

Select Category

From the list, select a category for the converted project.

Extraction Group name

By default, a name based on the project file is provided. To edit the default name, enter a name for the Extraction Group. The name must be unique.

Classification Group name

By default, a name based on the project file is provided. To edit the default name, enter a name for the Classification Group. The name must be unique.

Use the following buttons to navigate through the conversion tool.

Back

Navigate to the previous step in the conversion tool if it is available.

Convert

Convert the selected Kofax Capture (CAB files) and Kofax Transformation Modules projects into the format required by TotalAgility using all of the settings that you have provided.

Log

Record all steps taken by the user, including connection problems or errors with the conversion. This information is useful for troubleshooting.

The log information is stored in the memory only while the conversion tool is opened. To view the log in the Notepad, click the **Open Log** button. Save the log file for future reference.

Finish

Use this step in the wizard to determine if the conversion is successful so the project is ready for use in TotalAgility.

The following buttons are available.

Back

Navigate to the previous step in the wizard if applicable.

Close

Closes the conversion tool.

Additional information about the conversion is available in the log.

Log

The log records all the steps taken by the user, including the connection problems or errors with the conversion. This information is useful for troubleshooting.

The log information is stored in the memory while the conversion tool is opened. To view the log in the Notepad, click on the **Open Log** Button. You can save the log for future reference.

Converted project files

When a KTM project is converted, a Classification Group and an Extraction Group is created for that project.

The Extraction Group contains the same project hierarchy as it did in Kofax Transformation Modules, with the exception of the top level "Project Class" name. In the Extraction Group, the top level class is named the same as the project name, not "Project Class."

Each class in the Extraction group includes:

- Fields with their configuration settings.

  This includes any Formatters configured in the Project settings.
- Locators along with their configuration settings and supporting data.

  For example, the database used by a Database Locator or the dictionary used by a Format Locator is included.
- Validation rules and their methods as configured in the Project settings.

  If multiple validation rules use the same validation method, multiple copies of that method appear in the Extraction Group.
- All child classes.

The Classification Group contains all classification settings that were included in the original Kofax Transformation Modules project. The Classification Group is also mapped to the Extraction Group that was created at the same time.

Converted CAB files

A CAB file may contain a Kofax Transformation Modules project file (FPR) and/or a Kofax Capture file (CAB). If the CAB file has a FPR project file, it is converted in the same way as a standalone project file.

A CAB file can contain more than one batch class, so you need to convert each one separately. After converting one batch class, use the **Back** button to return to the Select file to import step.

A Kofax Capture file is converted into an Extraction Group and a Classification Group. The Extraction Group contains the project hierarchy, but no classification data is saved to the Classification Group.

For Kofax Capture projects, each batch class in the Extraction Group includes:

- `RootDocumentType`: top level document type.

- Document types: All document types are imported and nested under the `RootDocumentType` in the same hierarchy as Kofax Capture.
- Fields: Instead of fields being shown directly under a document type, they are listed under a Field Group. The number appended to the Field Group label denotes its level in the project hierarchy. Some fields are greyed out in the Field Group to indicate that they are inherited.

Note The name of the batch class is not visible in the converted project.

As with FPR projects, the Classification Group is mapped to the associated Extraction Group.

Extraction Group conversion restrictions

There are some exceptions to what can be converted to the Extraction Group of a TotalAgility project.

Validation methods only support the following types:
- Standard
- Date
- Regular Expression

A validation rule that uses one of the unsupported methods is not converted.

Format methods only support the following formatters:
- Amount
- Date
- Percentage

If a field is configured to use a Script formatter, that field is converted with all other configuration settings, but the formatter setting is left blank.

Save the log file

The logging information that is displayed at the bottom of the converter window is not stored permanently. The information is deleted when the tool is closed. You can view the log information in an external application such as Notepad, but unless you save it, the log is cleared when you close the conversion tool.

1. Open the log information in Notepad by clicking on the **Open Log** button.
2. In the Notepad, select **File** > **Save**.
   A window is displayed so that you can save the text file.
3. Browse to the saving location, provide a file name, and **Save**.
   The file is saved in the specified location.

Connect to TotalAgility

Use this step in the wizard to connect to the TotalAgility web service.

> **Important** To prevent errors during conversion, the same TotalAgility user cannot have multiple instances of the KC/KTM Converter connected to the same TotalAgility server. Also, it is not possible to run the KC/KTM Converter and the Project Builder at the same time using the same user credentials. An error message is displayed and the connection either times out or fails.

Provide the following information.

Web service connection

Enter the path to the TotalAgility server.

User name

Enter a valid user name.

Password

Enter the password for the associated user name. Click the eye icon at the right to reveal the password.

> **Note** If you are using the TotalAgility user credentials, enter the User name and Password before clicking Log On. If you are using Windows authentication, leave the User name and Password fields blank and click Log On.

Log On

Once you have entered the web service connection and a user name and password, click this button to connect to the TotalAgility server.

Log Off

If you are already logged on to a TotalAgility web service, click this button to disconnect from the TotalAgility server.

Back

Navigate to the previous step in the wizard if applicable.

Next

Navigate to the next step in the wizard if applicable.

Log

Log all steps taken by the user, including connection problems or errors with the conversion. This information is useful for troubleshooting.

The log information is stored in memory only while the conversion tool is opened. To view the log in Notepad, click the **Open** button. You can save the log file for future reference.

Select file to import

Use this step in the wizard to select a Kofax Transformation Modules project or a Kofax Capture CAB file so that it can be converted to the format required by TotalAgility.

The following options are available.

Select file to import

Click Browse to open a Windows Explorer to select the file to convert for use in TotalAgility. You can select either Kofax Transformation project file (FPR) or a Kofax Capture file (CAB).

> **Note** A CAB file is a set of batch class settings. A CAB file includes a Kofax Transformation Modules project only if "include KTM project" is selected before the .cab file is exported from Kofax Capture.

Select Batch Class

This option is only available if the selected FPR or CAB file contains more than one batch.

Select the batch class from the list.

> **Note**
> - You can only convert one batch class at a time. Return to this step after you finish converting the first batch class to convert others.
> - Ensure that the document class name and the form type name are unique in each Kofax Capture batch class.

Back

Navigate to the previous step in the wizard if applicable.

Next

Navigate to the next step in the in the wizard if applicable.

Log

Log all steps taken by the user, including connection problems or errors with the conversion. This information is useful for troubleshooting.

The log information is stored in memory only while the conversion tool is opened. To view the log in the Notepad, click **Open Log**. Save the log file for future reference.

Import the project

If you import the project from an older version of Kofax Transformation Modules, upgrade warnings and training set conversions may cause the import process to take longer than expected.

1. Open the Transformation Designer.
2. On the **File** menu, click **Import File-Based Project**.
3. Browse to the project file and select it.
4. In the **Name** field, type the name of the imported version of the project.

   This name is used for both the Classification Group and the Extraction Group in TotalAgility.
5. Select a category for the project.

   The category can be used to find the project in the TotalAgility Data Designer.
6. Click **OK**.

After import, TotalAgility saves the project in the Transformation Configuration database. You can edit the project or use the project directly. To use this project in TotalAgility, use the TotalAgility Data Designer to "release" the new Extraction Group.

Imported projects

When importing projects from Kofax Transformation Modules to TotalAgility, all the settings of the Kofax Transformation Modules project are not converted to Kofax TotalAgility.

Note The original Kofax Transformation Modules project file is not altered.

Shared project

The newly imported project is a Shared Project, which means the new Classification Group and Extraction Group are bound together and only limited changes can be made to them. For example, you may not add other Extraction Groups to the new Classification Group. Similarly, the versions of the Classification Group and Extraction Group of a shared project are always in sync. Saving the Extraction Group will also save and increase the version of the Classification Group.

Passing variables to an activity using XValues

In Kofax TotalAgility, you can pass XValues to Transformation projects in the Process Designer by mapping variables to the Input/Output configuration for an activity. The next time you access the XValue in Kofax Transformation Modules script code, a **KTA.InputVariable** prefix is applied to a corresponding XValue. For example, a **Country** process variable in the TotalAgility Designer passes the value to the transformation project in an XValue as **KTA.InputVariable.Country**.

Note In Real-Time Transformation Service (RTTI), access all XValues at the document level. In Kofax TotalAgility, access all XValues based on the specified activity input such as Document or Folder.

Document review methods and rules

Any document review-related methods or rules defined in Kofax Transformation Modules are deleted from the project and related settings are not accessible in the Transformation Designer. You must manually replicate them using the capabilities in TotalAgility.

Verification and correction

Verification and correction are not a part of the TotalAgility Transformation Designer. Verification and correction-related settings are not accessible in the imported TotalAgility project.

Validation forms

All the validation forms in the Kofax Transformation Modules project are deleted when the project is imported. Create replacement forms in the TotalAgility Form Designer.

Validation methods, formatters, and rules

All the validation rules in the Kofax Transformation Modules project are deleted when the project is imported. Create replacement rules in TotalAgility.

Note Validation methods and formatters are retained. Formatters used by the locators are executed during extraction; however, formatters used by fields are executed after extraction. Validation methods are executed after extraction and during validation.

Correction

All the Correction settings in the Kofax Transformation Modules project are deleted when the project is imported. However, when a project is opened in the Transformation Designer, the settings are initialized with default values. For example, if a correction setting is initially `<corrset version="1" showpre="0" shownxt="0" fullimg="1" showocr="1"/>`, it is initialized to `<corrset version="1"/>`.

Scripting

All scripts from the Kofax Transformation Modules project remain, but not all of them are executed in TotalAgility. Scripts triggering batch events need to be rescripted in TotalAgility to perform operations similar to batch restructuring.

The script interface is essentially a collection of event handlers. If the event is not called, the handler is not called. These handlers are at the source code level in the context of the project and classes. The event handlers are CDATA elements under the project and classes in the XML text for the project.

The script view editor in the TotalAgility Transformation Designer is the only supported way to modify the CDATA elements.

Note Supported events
"Supported events" table), TotalAgility offers native mechanisms to accomplish the same or similar tasks. Example: Foldering is now performed directly in TotalAgility instead of through Kofax Transformation Modules scripting.

Imported projects may contain scripts that reference Kofax Transformation Modules libraries that are not installed with the Transformation Designer. Edit the references of each script used in the project to ensure that all referenced libraries are available.

Note Shared projects and Extraction Groups support scripts to reclassify documents during extraction as long as the new document type is in the same Extraction Group.

Supported events

Event Name	Object	Context	Support	Comment
AfterAddDocument	Batch	Document		
AfterAddPage	Batch	Document		
AfterAutoFoldering	RootFolder	Folder		

Event Name	Object	Context	Support	Comment
AfterCellReread	FieldDef	Document	yes	
AfterChangeClass	Batch	Document		
AfterClassifyImage	Project	Document	yes	
AfterClassifyText	Project	Document	yes	
AfterClassifyXDoc	Project	Document	yes	
AfterComboboxItemSelected	ValidationForm	Document		
AfterComboboxItemSelected	ValidationForm	Folder		
AfterConfirmClass	Batch	Document		
AfterCopyDocument	Batch	Document		
AfterCopyPage	Batch	Document		
AfterCreateDocument	Batch	Document		
AfterCreateFolder	Batch	Folder		
AfterDeleteDocument	Batch	Folder		
AfterDeleteFolder	Batch	Folder		
AfterDeletePage	Batch	Document		
AfterExtract	Class	Document	yes	
AfterExtract	FolderField	Folder		Foldering
AfterExtract	Folder	Folder		Foldering
AfterExtract	FieldDef	Document	yes	
AfterFieldChanged	VerificationForm	Document		
AfterFieldChanged	ValidationPanel	Folder		
AfterFieldChanged	VerificationPanel	Folder		
AfterFieldChanged	ValidationForm	Document		
AfterFieldConfirmed	ValidationForm	Document		
AfterFieldConfirmed	VerificationPanel	Folder		
AfterFieldConfirmed	VerificationForm	Document		
AfterFieldConfirmed	ValidationPanel	Folder		
AfterFieldReread	FieldDef	Document	yes	
AfterMergeDocument	Batch	Document		
AfterMergeFolder	Batch	Folder		
AfterMoveDocument	Batch	Document		
AfterMoveFolder	Batch	Folder		
AfterMovePage	Batch	Document		
AfterProcess	Class	Document		

Event Name	Object	Context	Support	Comment
AfterRotatePage	Batch	Document		
AfterSeparatePages	Project	Document	yes	
AfterSplitDocument	Batch	Document		
AfterSplitFolder	Batch	Folder		
AfterTableCellChanged	ValidationForm	Document		
AfterTableCellComboBoxItemSelected	ValidationForm	Document		
AfterTableCellConfirmed	ValidationForm	Document		
AfterTableRowAdded	ValidationForm	Document		
AfterViewerLassoDrawn	ValidationForm	Document		
AnnotationCreated	Application	Document		
AnnotationSaved	Application	Document		
BeforeAddDocument	Batch	Document		
BeforeAddPage	Batch	Document		
BeforeAutoFoldering	RootFolder	Folder		Foldering
BeforeChangeClass	Batch	Document		
BeforeClassifyImage	Project	Document	yes	
BeforeClassifyText	Project	Document	yes	
BeforeClassifyXDoc	Project	Document	yes	
BeforeComboBoxDropDown	ValidationForm	Document		
BeforeComboBoxDropDown	ValidationPanel	Folder		
BeforeConfirmClass	Batch	Document		
BeforeCopyDocument	Batch	Document		
BeforeCopyPage	Batch	Document		
BeforeCreateDocument	Batch	Document		
BeforeCreateDocumentMovingPage	Batch	Document		
BeforeCreateFolder	Batch	Folder		
BeforeCreateFolderMovingDocument	Batch	Folder		
BeforeCustomMenuDropDown	Application	Folder		
BeforeDeleteDocument	Batch	Document		
BeforeDeleteFolder	Batch	Folder		
BeforeDeletePage	Batch	Document		
BeforeExtract	Class	Document	yes	
BeforeExtract	FolderField	Folder		Foldering
BeforeExtract	FieldDef	Document	yes	

Event Name	Object	Context	Support	Comment
BeforeExtract	Folder	Folder		Foldering
BeforeFieldGetFocus	ValidationForm	Document		
BeforeFieldGetFocus	VerificationForm	Document		
BeforeMergeDocument	Batch	Document		
BeforeMergeFolder	Batch	Folder		
BeforeMoveDocument	Batch	Folder		
BeforeMoveFolder	Batch	Folder		
BeforeMovePage	Batch	Document		
BeforeOverrideDocumentProblem	Batch, Document Review	Document		
BeforeOverrideFolderProblem	Batch, Document Review	Folder		
BeforeProcessXDoc	Project	Document	yes	
BeforeRestoreDocumentProblem	Batch, Document Review	Document		
BeforeRestoreFolderProblem	Batch, Document Review	Folder		
BeforeRotatePage	Batch	Document		
BeforeSeparatePages	Project	Document	yes	
BeforeSplitDocument	Batch	Document		
BeforeSplitFolder	Batch	Folder		
BeforeTableCellComboBoxDropDown	ValidationForm	Document		
BeforeTableCellGetFocus	ValidationForm	Document		
BeforeTableRowDeleted	ValidationForm	Document		
BeforeTDS	Project	Document	yes	
ButtonClicked	ValidationPanel	Folder		
ButtonClicked	ValidationForm	Document		
ButtonDialogClosed	ValidationPanel	Folder		
ButtonDialogClosed	ValidationForm	Document		
Close	Batch	Folder		BatchClose
CustomMenuClicked	Application	Folder		
DeinitializeScript	Application	Global	yes	
DocumentLoaded	ValidationForm	Document		
DocumentLoaded	VerificationForm	Document		
DoFoldering	RootFolder	Folder		Foldering

Event Name	Object	Context	Support	Comment
FieldGotFocus	ValidationPanel	Folder		
FieldGotFocus	ValidationForm	Document		
FieldGotFocus	VerificationPanel	Folder		
FieldGotFocus	VerificationForm	Document		
FolderLoaded	ValidationPanel	Folder		
FolderLoaded	VerificationPanel	Folder		
FormatDateField	Formatter	Document	yes	
FormatDoubleField	Formatter	Document	yes	
FormatField	Formatter	Document	yes	
InitializeBatch	Application	Folder		
InitializeComboBox	ValidationPanel	Folder		
InitializeComboBox	ValidationForm	Document		
InitializeScript	Application	Global	yes	
InitializeTableComboBox	ValidationForm	Document		
LocateAlternatives	LocatorDef	Document	yes	
Open	Batch	Folder		BatchOpen
SeparateCurrentPage	Project	Document	yes	
TabIndexChanged	ValidationForm	Document		
TableActiveCellChanged	ValidationForm	Document		
TableCellGotFocus	ValidationForm	Document		
TableSelectionChanged	ValidationForm	Document		
Validate	SingleFieldValidation	Document		Validating
Validate	MultiFieldValidation	Document		Validating
Validated	Class	Document		Validating
Validated	Folder	Folder		
ValidateDocument	StructureMethod	Document		Validating
ValidateFolder	StructureMethod	Folder		Foldering
ValidateFolderFields	MultiFieldValidation	Folder		Foldering
XDocPageRotated	Project	Document	yes	

Foldering

Kofax Transformation Modules foldering, folder nodes and scripts are deleted from the project file during import. You must re-configure them in TotalAgility. In particular, scripts configured in the Foldering_DoFolder() method are removed.

Fuzzy database lookups

TotalAgility can perform fuzzy database lookups during extraction and validation with the following restrictions:

- If the original project is configured with a local fuzzy database, a text file is imported into the TotalAgility project which it can use for fuzzy lookups.
- If the TotalAgility automatic import option is enabled, the original text file is periodically checked to see if it has been updated, and if so, it is automatically imported. This can only work if the TotalAgility Transformation Server can access the original text file. In some cases, this can degrade the performance of the Transformation Server, so it may be better to use KSMS (Kofax Search and Matching Server) instead.

Online Learning

Online Learning in TotalAgility is similar to that in Kofax Transformation Modules, but with some notable differences.

- Generic Online Learning is not called out as a specific feature in TotalAgility, but the same capability can be achieved by using a TotalAgility process map to route exceptions to a designer for evaluation.
- In TotalAgility, Online Learning is equivalent to Specific Online Learning in Kofax Transformation Modules.
- In TotalAgility, the Online Learning Path is automatically managed such that new samples are stored in a database and is accessible from within the Transformation Designer. Consequently, in Transformation Designer, the path cannot be configured in the project settings.

Online Learning is configured in TotalAgility Designer or the Transformation Designer when configuring an Extraction Group.

To enable Online Learning for an Extraction Group, set **Enabled** to **Yes**. Use Online Learning only if the Extraction Group is using one or more of the following trainable locators.

- Invoice Group Locator
- Order Group Locator
- Amounts Group Locator
- Trainable Group Locator

Note

- "Maximum New Samples" sets a limit to the number of documents that are saved for maintenance of the Extraction Group. More documents require more storage space and could reduce the effectiveness of Online Learning.
- "Automatic" automatically marks documents for Online Learning; reducing the training needed for Validation operators. When using Automatic, enable "Monitor for Automatic Online Learning" for fields connected to trainable locators.
- To use the Unassisted Training feature of the Line Item Matching locator, you must enable Online Learning for the Extraction Group.

Online learning system task

Unlike the Kofax Transformation Modules workflow, documents are not immediately processed by the Knowledge Based Learning Server when validation is complete. Instead, the selected documents are copied to a holding area in the database until the Online Learning system task is run. The workflow continues without waiting for Online Learning.

At the configured times, the Online Learning system task processes any saved documents to update the Dynamic Specific Knowledge Bases to improve the extraction results for subsequent jobs. By default, the Online Learning system task runs every hour. For some installations, once a day may be sufficient.

Configure the Online Learning system task in TotalAgility in the System Tasks group.

Learning sample maintenance

Depending on the project, the administrator should perform periodic project maintenance between once a week and once a month. This maintenance consists of importing the accumulated "New Samples" documents into the Transformation Designer and retraining the extraction system. Since these documents are in a database on the TotalAgility server, they need to be downloaded to the local hard disk before importing them into the project.

With the project (Extraction Group) loaded into the Transformation Designer, navigate to the Documents tab of the tool ribbon and click **Download New Samples**. A window appears from which you can select the learning samples to download.

Note Use this window to delete the downloaded or unwanted samples from the server.

When deleting the unwanted samples from the server, make sure you connect to the correct server. In many installations, the production server and the test server may be different.

After saving the downloaded files locally, there will be a New Samples document set containing the documents from the TotalAgility server to import into the project's **Extraction Training Set**.

After updating the Extraction Training set and retraining the project, release the Extraction Group into production.

Kofax Import Connector to TotalAgility

To migrate from Kofax Import Connector to TotalAgility, configure specific settings in TotalAgility to make sure that your existing import configuration remains intact. Identify the existing metadata fields in your Kofax Import Connector destination configuration and map them to the corresponding metadata fields of import sources in TotalAgility.

See the following table for the Kofax Import Connector message fields and the corresponding TotalAgility metadata fields.

Kofax Import Connector message fields	TotalAgility metadata fields	IMAP/EWS/ POP3/ SMTP	External fax server/FOIP	File
KfxImportFolderName	Message Import Folder	Yes		
KfxMessageAttachmentList	Message Attachment List	Yes		Yes
KfxMessageCorrelation	Message Correlation	Yes	Yes	Yes
KfxMessageDeliveryPriority	Message Delivery Priority	Yes	Yes	Yes
KfxMessageDeliverySuspectedDupli	Message Suspected Duplication	Yes	Yes	Yes
KfxMessageDeliveryType	Message Delivery Type	Yes	Yes	Yes
KfxMessageFileName	Message General File Name		Yes	
KfxMessageID	Message ID	Yes	Yes	Yes
KfxMessageOwnerReference	Message Owner Reference	Yes	Yes	Yes
KfxMessagePages	Pages		Yes	
KfxMessageReceptionCallerId	Message Reception Caller Id		Yes	
KfxMessageReceptionErrorImporting	Message Importing Error	Yes	Yes	Yes
KfxMessageReceptionErrorInfo	Error information	Yes	Yes	Yes
KfxMessageReceptionErrorLevel	Error Level	Yes	Yes	Yes
KfxMessageReceptionTimeCreated	Message Reception Time Created	Yes	Yes	Yes
KfxMessageReceptionTimeReceived	Message Reception Time Received	Yes	Yes	Yes
KfxMessageSubject	Subject	Yes	Yes	Yes
KfxMessageTimePosted	Time Posted	Yes		
KfxOriginalRecipients	Import Source Recipients	Yes	Yes	Yes
KfxOriginatorName	Message Originator Name	Yes	Yes	Yes

Kofax Import Connector message fields	TotalAgility metadata fields	IMAP/EWS/ POP3/ SMTP	External fax server/FOIP	File
KfxOriginatorNumber	Message Originator Number	Yes	Yes	Yes
KfxOriginatorService	Message Originator Service	Yes	Yes	Yes
KfxRecipientName	Message Recipient Name	Yes	Yes	Yes
KfxRecipientNumber	Import Source Address	Yes	Yes	Yes
KfxRecipientService	Message Recipient Service	Yes	Yes	Yes
KfxRecipientsBCC	Bcc	Yes		Yes
KfxRecipientsCC	CC	Yes		Yes
KfxRecipientsTo	To	Yes		Yes
KfxRoutingNumber	Message Routing Number	Yes	Yes	Yes