



Ephesoft Transact

Release Notes

Version 4.5.0.2

September 2018

Copyright © 2018 by Ephesoft, Inc.
All rights reserved

Copyright © 2018 by Ephesoft, Inc. All rights reserved.

This publication pertains to Ephesoft and to any subsequent release until otherwise indicated in new editions or technical notes. Information in this document is subject to change without notice. The software described herein is furnished under a license agreement, and it may only be used in accordance with the terms of that agreement.

Upgrades are provided only at regularly scheduled software release dates. No part of this publication may be reproduced, transmitted, or translated in any form or by any means, electronic, mechanical, manual, optical, or otherwise, without the prior written permission of Ephesoft, Inc.

Ephesoft and the marks listed are trademarks of Ephesoft, Inc. ® indicates registration in the United States of America.

Java and all Java-based marks are trademarks or registered trademarks of Oracle and/or its affiliates in the U.S. and other countries.

Unicode and the Unicode Logo are registered trademarks of Unicode, Inc.

All other company and product names mentioned may be trademarks of the respective companies with which they are associated.

Use, duplication, or disclosure by the government is subject to the restrictions set forth in subparagraph (c)(1)(ii) Of DFARS 52.227-7013 for the DOD and as set forth in FAR 52.227-19(a)-(d) for civilian agencies.

Ephesoft, Inc., 23041 Avenida De La Carlota, #100, Laguna Hills, CA 92653

Support

We are committed to providing the highest level of support for our users.

We are looking for:

Problems that you may encounter when following our instructions.

Additional topics that you think are important.

Ephesoft welcomes your feedback:

We will log your request and consider every suggestion. Our support team is available to answer your queries. We strive to improve every documentation release.

For online service, support, training, and documentation, visit <http://www.ephesoft.com/>.

Send your feedback to: tickets@ephesoft.com

We are pleased to give you Ephesoft Transact 4.5.0.2 September 2018.

Thank you for choosing Ephesoft Transact.

Table of Contents

1.	Introduction.....	5
2.	Installation Notes.....	5
3.	Release Overview	5
4.	What’s New?	6
	Transact 4Mortgage.....	6
	Beta Hybrid Cloud Plugin to Ephesoft Transact.....	6
5.	Integration Features.....	6
	Web Services.....	6
6.	Feature Enhancements.....	7
	Email Import	7
	Reporting data cleanup mechanism.....	7
	Fixed Form Extraction performance.....	8
7.	Bug Fixes.....	8
8.	Known Issues and Workarounds	10

1. Introduction

This document introduces Ephesoft Transact v.4.5.0.2 and contains a short description of new features and enhancements to the Ephesoft Transact product as well as specific bug fixes and workarounds for potential issues.

2. Installation Notes

To install or upgrade to Ephesoft Transact v.4.5.0.2, you must have Release 4.5.0.0 installed.

Additional installation information for Release 4.5.0.0 as well as 4.5.0.1 is available at the following location:

- Product Documentation on the Ephesoft Wiki
<http://wiki.ephesoft.com/home/documentation>
- Windows Installer Upgrade — If you are upgrading to Ephesoft Transact v.4.5.0.0 and above, please refer to the following document
<https://wiki.ephesoft.com/microsoft-windows-transact-4-5-0-0-installation-guide-upgrade>

3. Release Overview

Release Category	Functional Area	Description
What's New?	Batch Class Management	Transact 4Mortgage
	Plugins	(Beta) Hybrid Cloud Plugin to Ephesoft Transact (both cloud and on-prem environments)
Integration Features	Web Services	Swagger UI Support
		Two additional advanced workflow web services
Feature Enhancements	Email Import	Support of on-premise Microsoft Exchange servers
		Support of Email Headers with EWS
	Cleanup	Improvements in Reporting data cleanup mechanism

	Extraction	Improvements in Fixed Form Extraction performance
Bug Fixes	Various	

4. What's New?

Transact 4Mortgage

Ephesoft Transact v.4.5.0.2 offers a new licensed cloud-based solution – Transact 4Mortgage. It is a modular platform pre-trained to recognize and classify over 600 mortgage document types. The new Transact 4Mortgage out of the box supports classification only, but with Ephesoft Professional Services this new solution can be tailored to your specific needs. The Transact 4Mortgage is designed for a cloud single-tenant environment.

There are two packages offered:

- Standard, providing classification for approx. 500 document types (loan processing for conventional loans only);
- Premium, providing classification only for approx. 600 document types (loan processing for conventional and Federal Housing Administration (FHA) loans only).

For more information on Transact 4Mortgage, refer [here](#).

Beta Hybrid-Cloud Plugin to Ephesoft Transact

In Ephesoft Transact v.4.5.0.2 we introduce a beta Transact Hybrid-Cloud. It comes bundled with the installer and allows for offloading the OCR services for converting PDFs to single page TIFs and the various images for displaying in Transact. This plugin provides flexibility to ramp up and ramp down based on high volume demands. This beta version is limited to 10,000 images per month in trial capacity.

This is a beta offering and we are looking for customer feedback. Reach out to Product Management if you are interested in receiving more information or in participating in a Beta Test phase with the Hybrid-Cloud plugin at product.management@ephesoft.com.

5. Integration Features

Web Services

Swagger UI Support

In this release, the traditional Ephesoft Transact web services have been integrated with Swagger 2.4.0. Swagger support allows the web services to become self-documented through a Swagger UI. 59 out of 64 existing web services have been updated to leverage the Swagger UI. The Swagger UI comes bundled with the Transact v.4.5.0.2 installer.

Known limitations of Swagger 2.4.0:

1. Download of zip responses are not supported from within the Swagger UI. When trying to run a web service with a zip download response, Swagger returns a corrupted zip file, or no file is downloaded.
2. Swagger converts "multipart/formdata" requests to "x-www-url-form" request when only "strings" are passed in the request and no file is sent.
3. If a web-service takes only files as the input, even if they're marked as "required", the Swagger UI allows the request to be sent without providing the files and will not throw an error.
4. If a download manager is configured on the system (e.g. Internet download manager), the response from web service is captured by the download manager and Swagger returns a 204 response code and no content in the body.

Note that due to these limitations, not all Ephesoft Transact web services will run from the Swagger UI, however they can be executed using the Postman tool.

Two additional advanced workflow web services

We duplicated our existing ocrClassifyExtract web service to work with advanced workflow products like Nintex and Microsoft Flow. These tools allow “citizen” developers to create workflows between numerous organizations without developing code. The new web services (/rest/v2/ocrClassifyExtract and /rest/v2/ocrClassifyExtractBase64) have a lighter footprint and leverage JSON for interoperability.

For more information specific to these new web services, refer [here](#).

6. Feature Enhancements

Email Import

In Ephesoft Transact v.4.5.0.2, the email import functionality has been improved.

Support of on-premise Microsoft Exchange servers

EWS (Exchange Web Services) are now supported for on-premise Microsoft Exchange servers (Microsoft Exchange 2013 and 2016).

Support of Email Headers with EWS

The user can now configure the email headers (Subject, From, To and Date) to be included in the batch.xml file when processing batches via EWS.

For more information, refer [here](#).

Reporting data cleanup mechanism

The Transact Reporting module has been updated to improve several data cleanup inefficiencies. Prior to Transact 4.5.0.2 three specific activity tables were cleaned up only after all reporting jobs were completed successfully. The data contained in these tables can be cleaned up (purged) once

a batch actually completes. The change in the release is to clean up the data from the following tables when the batch is in the Finished state and when this data is no longer needed:

ACT_HI_ACTINST
 ACT_HI_VARINST
 ACT_GE_BYTEARRAY

These tables are cleaned up using a database procedure while remaining tables are purged as usual by running a cleanup job.

Fixed Form Extraction performance

In Ephesoft Transact v.4.5.0.2, the fixed form extraction with Recostar (for Windows) has been improved to increase PPM on 8/16/32 core machines.

7. Bug Fixes

Axosoft ID	Category	Description
EPHE-21923	Extraction	The extraction results after performing Test Extraction and Batch Upload were not consistent.
EPHE-22586	Extraction	The name of all Page Level Fields under the KV_PAGE_PROCESS module was changed to “KV_Page_Process” when upgrading from Transact version 4.1.3.0 to 4.5.0.0 or from v.4.5.0.0 to 4.5.0.1 in Linux environment, irrespective of what their names were before the upgrade.
EPHE-22585	Extraction	Advanced Barcode Reader when set to extract barcode with type DATA MATRIX using Nuance was failing for some samples and causing the Ephesoft service to crash.
EPHE-22645	Extraction	Already extracted values on the Validation screen were removed when performing REST API Lookup for a specific field and retrieving results.
EPHE-22534	Extraction	FuzzyDB Search did not return correct values for the index fields with “COMBO” Field Type when performing Fuzzy lookups on the Validation screen.
EPHE-22679	Extraction	The manual extraction field in the batch.xml was not updating to “true” after performing manual extraction in a batch.

EPHE-22228	Web Scanner	Ephesoft Web Scanner jobs were throwing an error and batch instances were failing if the scanning session was active and open for over one hour. This was happening in SSO environment which was refreshing cookies every 1 hour.
EPHE-23123	Web Scanner	Advanced Web Scanner Service configured over HTTPS was giving Certificate Expiration warnings, and customers had to click “OK” in the Certificate Details dialog window each time to continue scanning.
EPHE-22816	Web Scanner	After successfully scanning a single page using supported web scanner, the Finish button remained disabled. It only became enabled when scanning two or more pages. The issue was observed in Ephesoft Transact v.4.5.0.0 and v.4.5.0.1.
EPHE-22165	Export	Ephesoft Transact failed to generate output in PDF/A-1b format.
EPHE-22798	Export	When using DB Export and outputting Null values to the database table, an error occurred in DB Export plugin.
EPHE-22022	SSO	Ephesoft application did not support Active Directory with SSO and Authentication Type 1 (both SSO authentication and Authorization done at Ephesoft end).
EPHE-21909	LIM	When copying lines containing empty cells from the right to left side during Line Item Matching (LIM), the printed word “null” was copied into the table and exported into the batch.xml file as well.
EPHE-22623, EPHE-22524	RV screen	The shortcut used for quick save (Ctrl+Q) on the Validation screen was blocking the index fields from further editing.
EPHE-21642	Reporting	Advanced Reporting was not picking up new data and cleanup was not working.
EPHE-22601	Scripts	FieldValueChangeScript with index field type “LIST” was getting executed by clicking anywhere on the Validation screen.

EPHE-22504	Other	Occasionally batches were getting stuck in the Import module and JVM was crashing when trying to process a multi-page TIFF file leveraging our third-party Barcode Reader and QR barcode type.
EPHE-22188	Other	Batches went into error in the Automated Regex Validation plugin after upgrading to Ephesoft Transact v.4.5.0.0

8. Known Issues and Workarounds

Please refer [here](#) for Ephesoft Transact v.4.5.0.2 Known Issues and Workarounds.