

# **Release Notes**

## Ephesoft Transact Version 4.1.0.0



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#### Thank you for choosing Ephesoft.

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### 1. Introduction

The Ephesoft Transact 4.1.0.0 Release Notes describes the improvements and new features introduced in the package, as well as workarounds for possible issues. Use these release notes for reference as you become more familiar with the product, and for future reference.

#### 2. Document Overview

To help you understand what's new and what is fixed relative to the current release, Ephesoft Transact 4.1.0.0 Release Notes have been structured so that you read only the sections relevant to you.

The improvements have been categorized based on various parameters so that the functionality of the current release is compared describing the version you are upgrading from.

## 3. Release Charter

#	Release Type	Category	Description
1	New Features	Extraction	<ul> <li>Cross Section Extraction</li> <li>Wrapped Data Extraction</li> <li>Format Conversion</li> <li>Paragraph Extraction</li> <li>Machine Learning of Fields</li> <li>Form Template Editor for Nuance in Application</li> </ul>
		Classification	<ul> <li>Keywords based Classification</li> <li>Machine learning for Document Types</li> <li>Multidimensional Classification</li> </ul>
		Database	• Support for connecting Ephesoft Application & Reporting to Oracle database.
		Authentication	<ul><li>Support for PIV/CAC</li><li>Support for SAML2.0 for SSO</li></ul>
2	Improvements	Extraction	<ul> <li>Table Extraction algorithm and UI revamp</li> <li>Multiline extraction support in tables</li> <li>Table Column Extraction Rule UI revamp and extraction support for tables containing horizontal and horizontal + vertically aligned columns</li> <li>Extraction support for tables with headers wrapped in multiple lines and table data not aligned to the header</li> <li>OCR confidence being accounted for table extraction</li> </ul>
		Batch Class Management	<ul> <li>Ability to view samples for Test Extraction on the UI</li> <li>Ability to view samples for Test Classification on the UI</li> <li>Ability to view/download/delete samples for learning from UI</li> <li>Ability to utilize benefits of a Global Batch Class/Document Types</li> </ul>
		Batch Instance Management	<ul><li>Next Batch Selection</li><li>Batch in Suspended status</li></ul>
		Installer	<ul> <li>Ability to run Ephesoft Transact as a Non-Root user</li> <li>Ability to continue installation offline without Internet access</li> </ul>
3	Bug Fixes		

## 4. Appendix A - New Features

#### Extraction

#### **Cross Section Extraction**

With Ephesoft Transact v4.1.0.0, Cross Section Extraction has been introduced. It is an extraction rule used where a single key pattern is not sufficient for a value as the value lies at the cross section of two keys.

You can use this extraction rule to extract values present at a cross section of two matching regex patterns. The index field values for which **Cross Section Extraction** is configured are extracted using a plugin.

**CROSS\_SECTION\_EXTRATION** Plugin governs the extraction of configured index field while using **Cross Section Extraction**.

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Automated Validation				
Validate Document				
Export				
Email Configuration				
Scanner Profiles				

By default, the switch is set to **OFF**. If the value of the switch is set to **ON**, the configured index filed is extracted.

#### Wrapped Data Extraction

Earlier, it was difficult to extract index field values that spanned across multiple rows; for example, addresses.

If a Value Pattern regex does not find a complete match, a value pattern is not found and no Value is returned from the iteration.

To overcome this challenge, **Wrapped Data Extraction** has been introduced in Ephesoft v4.1.0.0. You can now use **Wrapped Data Extraction** to search for regex matches in index fields with values spanning multiple rows.

You can configure the index fields for which **Wrapped Data Extraction** has to be used by selecting **Is Wrapped** on the **Advanced KV Extraction** screen as shown in the image below.

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FORMAT_I Conversion	BASED_EXTRACTION_ n.	PLUGIN governs the fo	rmatting of extracted	d index fields whi	le using <b>Format</b>



If the value of the switch is set to **ON**, the configured index filed is extracted, else not. By default, the switch is set to **OFF**.

#### Machine Learning of Fields

With Ephesoft v4.1.0.0 a new feature, **Machine Learning**, has been implemented to assist you to improve the learning of document fields. You can now enable operators to perform learning of index fields from the **Validate** screen.

MACHINE\_LEARNING\_EXTRATION Plugin governs the Machine Learning feature.

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The **Roles for Machine Learning** column displays all the available Ephesoft user roles, including admin.

As an Ephesoft administrator, if you want to configure **Machine Learning** for fields, then you must select the user roles from the **Roles for Machine Learning** column that can perform machine learning for the document type.

If there are no user roles assigned under the **Roles for Machine Learning** column for a document type, then it is assumed that **Machine Learning** is not enabled for the fields within that document type.

#### Support for Nuance Form Template Editor

In Ephesoft v4.1.0.0, **NUANCE\_EXTRACTION\_PLUGIN** has been enhanced. You can now use the **NUANCE\_EXTRACTION\_PLUGIN** to extract:

- Text data
- Checkbox data
- OCR form data
- Hand-written data
- Barcode data

You can also use the NUANCE\_EXTRACTION\_PLUGIN to extract data in multiple languages.

Also, in Ephesoft v4.1.0.0, Nuance has been upgraded to v 19.2.3.

Data extraction through Nuance now happens with the help of template files (\*.tlz). These template files are created using **Nuance Form Template Editor** application installed on Windows systems.

In Ephesoft v4.1.0.0, Nuance has been upgraded to the latest available version (19.2.3). Support has been

provided for Nuance Form Template Editor in Ephesoft.

#### Classification

#### **Keywords Based Classification**

Earlier, for you to be able to classify documents using keywords, you would need to specify the rules through 'ScriptPageProcessing' in SharedFolder.

With Ephesoft v4.1.0.0 a new feature, **Keywords Based Classification**, has been implemented to improve document classification based on keywords often present/not present in the document types.

Writing the scripts to classify documents used to be a manual process. **Keywords Based Classification** intends to automate this. You now have an interface to configure the rules enabling classification of documents based on keywords.

**KV\_PAGE\_PROCESS** Plugin within the **Page Process** module governs the classification of documents based on keywords.

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CREATE_DISPLAY_IMAGE	
CREATE_THUMBNAILS	
SEARCH_CLASSIFICATION	
MULTIDIMENSIONAL_CLASSIFICATI	
ADVANCED_BARCODE_READER	
KV_PAGE_PROCESS	
Page Level Fields	
Classification Rules	
TESSERACT_HOCR	
Document Assembly	
Review Document	
Extraction	
Automated Validation	
Validate Document	
Export	
Email Configuration	

If the value of the switch is set to **ON**, you can classify documents based on keywords, else not. By default, the switch is set to **ON**.

You can use the **Page Level Fields** node within the **KV\_PAGE\_PROCESS** Plugin to define page level fields for a document type.



You can use the **Classification Rules** node within the **KV\_PAGE\_PROCESS** Plugin to set rules to be used for classification of document type based on keywords.

<ul> <li>TechPubs</li> </ul>	s-BCC	Document Name	First Page Rules	Last Page Rules	MultiPage Document
🕨 🖿 Docun	nent Types	No Records Found			
🤝 🔁 🗸 🗸	es	no necolas Found.			
🕨 🖿 Fol	der Import				
🤝 📥 Pag	je Process				
	CREATE_OCR_INPUT				
	RECOSTAR_HOCR				
	CREATE_DISPLAY_IMAGE				
	CREATE_THUMBNAILS				
C :	SEARCH_CLASSIFICATION				
	MULTIDIMENSIONAL_CLASSIFICATI				
	ADVANCED_BARCODE_READER				
🖉 🤜 🗸	V_PAGE_PROCESS				
C	Page Level Fields				
C	Classification Rules	<b>Г</b>			
C) -	TESSERACT_HOCR				
🕨 🖿 Doc	cument Assembly				
🕨 🖿 Rev	view Document				
🕨 🖿 Ext	raction				
🕨 🖿 Aut	omated Validation				
🕨 🖿 Vali	date Document				
🕨 🖿 Exp	oort				
🗀 Email	Configuration				
< <u>~</u> -					
	Powered by Ephesoft	O Page 1 of 1	Displaying 0 - 0 of 0	Showing 15 - Records per page	

#### Machine learning for Document Types

With Ephesoft v4.1.0.0 a new feature, **Machine Learning**, has been implemented to assist you to improve the learning of document types. You can now enable operators to perform learning of document types from the **Review** screen.

MACHINE\_LEARNING\_EXTRATION Plugin governs the Machine Learning feature.

If the value of the switch is set to ON, machine learning is done, else not. By default, the switch is set to OFF.

A new column named **Roles for Machine Learning** has been added to the **Document Types** screen.

The **Roles for Machine Learning** column displays all the available Ephesoft user roles, including admin.

As an Ephesoft administrator, if you want to configure **Machine Learning** feature for a document type, then you must select the user roles from the **Roles for Machine Learning** column that can perform machine learning for the document type.

If there are no user roles assigned under the **Roles for Machine Learning** column for a document type, then it is assumed that **Machine Learning** is not enabled for the document type.

The user roles defined for machine learning of document types are used for machine learning of index fields within the document type.

You can now enable operators to perform learning of a document type from the **Review** screen. A shortcut **(Shift + z)** has been added to the **Review** screen. Using this shortcut opens the **Document Machine Learning** screen.

= Ephesoft	Review Merge - Next Batch Table More -	Post Travel # 112/05
TRANSACI	Document Machine Learning	NE DIVE & MEI REINOCO DE. PO Namber Avis
	Prix Poge(s)	
	Holde Page(s) The set of the set	
	Last Page(s)	
	■ ■ ■ ■ ■ ■ ■ ■ ■ ■	
	Learn Files Cancel	
Powered by Fohesoft	Receiver and	

From the **Document Learning Screen**, you can choose which page of a document to be learned as **First Page**, **Middle Page** & **Last Page** of the document.

This screen is divided in 3 horizontal panels. The first (top) panel displays a thumbnail of the **First Page** of the document. The last (bottom) panel displays a thumbnail of the **Last Page** of the document. The second (middle) panel displays thumbnails of all other pages. You can drag a page from any panel and drop it to any other panel.

After making relevant changes when you click **LEARN FILES**, temporary files are created but the learning is completed only after the batch has moved from the **Review** state.



#### **Multidimensional Classification**

With Ephesoft v4.1.0.0, an enhancement has been done to implement a new classification mechanism.

Multidimensional Classification has been introduced to improve accuracy of classification with Ephesoft.

MULTIDIMENSIONAL\_CLASSIFICATION\_PLUGIN in the Document Assembly module governs this feature.

TechPubs-BCC	- Plugin Configuration	4		
Document Types		Multidimensional Classification Switch:*	OFF 👻	
🔻 🗁 Modules			OFF	
Folder Import			ON	
🔝 🗁 Page Process		4		
CREATE_OCR_INPUT				
RECOSTAR_HOCR				
CREATE_DISPLAY_IMAGE				
CREATE_THUMBNAILS				
SEARCH CLASSIFICATION				
MULTIDIMENSIONAL_CLASSIFICATION	N			
ADVANCED_BARCODE_READER	1			
Document Assembly				
Review Document	<			
Extraction	<b>F</b>			
Automated Validation				
Validate Document				
Export				
Email Configuration				
Scanner Profiles				
CMIS Import				
Batch Class Field				

This plugin has only one configuration which is switch. If the value of the switch is set to ON, multidimensional classification is used to classify documents, else not. By default, the switch is set to OFF.

#### Database

#### Support for Connecting Ephesoft Application & Reporting to Oracle database.

Earlier, Ephesoft supported the following databases:

- MySQL
- Maria DB
- SQL Server

Support for Oracle database has been introduced in Ephesoft v4.1.0.0.

You can now install Ephesoft with Oracle database. Oracle database is not shipped with Ephesoft Installer. You will be prompted by the installer to enter the credentials needed to connect with an existing Oracle database instance on the system.

Ephesoft supports the following Oracle versions:

- Oracle 12c
- Oracle 11.2.0.x

It is important to note that Oracle database is supported only for fresh installation of Ephesoft v4.1.0.0. No upgrades are supported.

Also, table and column names with more than 30 characters are not supported by Oracle database.

The following changes have made to achieve this:

• Domain Layer: The default naming strategy has been overridden to create tables and columns with shortened names in case of Oracle database. Sequences are created for batch\_instance and batch\_class id column.

- **Reporting (ETL and Logi info Reports)**: Separate set of ETL scripts and Logi info reports are maintained for Oracle databse.
- Database Schema and Patch: Oracle-compatible SQL files have been created.

#### Authentication

#### Support for PIV/CAC

With Ephesoft v4.1.0.0, Personal Identity Verification (PIV)/Common Access Card (CAC) Authentication Solution is now supported. The PIV/CAC Authentication Solution provides a vital layer of security to effectively thwart illicit access, retrieval, capture or copying of sensitive documents and data using digital Multifunction Printers (MFPs).

Common Access Card (CAC) is a smart card used by employees and other personnel in the United States Department of Defense (DoD). CAC includes a picture of the user along with other information such as their name. DoD employees wear the CAC as a badge and can show it to guards to prove their identity. They can also use it as a smart card to log onto systems.

Personal Identity Verification (PIV) card is a specialized smart card used by personnel in United States federal agencies. Just as a CAC does, the PIV card includes a picture of the user along with their name. A PIV can be used for visual verification of users, and then as a smart card when users log onto their computer.

After the setup, If the PIV card is attached to the client system, and you try to access the DCMA page, then browser prompts you to select a certificate.

					Subject	Issuer	Serial	
					JOHN	Ephesot	t 00D6C23AD37E6723A9	
select	ing a c	ertificate, v	ou are prompte	ed to enter	the authen	tication PIN.		
		, ,						
	Loading	×						
4	→ ×	https://localb	ost:8080/dcma/Batch	ClassManageme	ent html			
	Apps 🕒 N	lisc: Analyzing Mem	Save Memory by Usin	Copy a file from	linux 🖻 Cyberoan	n 🗽 Monitoring an Appl	ica 🧿 www.oracle.com/t	tech 🔓 XML Svi
					,			
				Windows Secu	rity		<b>-X</b>	
				Windows Seed	ity .			
				Microsof	t Smart Card Prov	vider		
				Please enter	your authentication P	IN.		
					57.1			
					PIN			
					<u>Click here for more</u>	re information		
						ОК	Cancel	
							)	
,		مطغ مسبو مالم		مانه مد مهاد م	a subificanta in s			
	еа то т	iake sure tha	it user correspon	laing to the	certificate is	present in IVISA	D/LDAP with pr	oper roles

#### Support for SAML2.0 for SSO

Ephesoft v4.1.0.0 enables you to configure Ephesoft with Spring Security, both with and without SAML (Security Assertion Markup Language) integration.

SAML is an XML-based, open-standard data format for exchanging authentication and authorization data between parties, in particular, between an identity provider (IdP) and a service provider (end user).

## 5. Appendix B - Improvements

#### Extraction

#### Table Extraction Algorithm and UI Revamp

The following improvements have been made to the Table Extraction Configuration page:

- You now have the ability to configure table with image view.
- Regex suggestion utility has been integrated with tables.
- You can now configure all table extraction properties like Column pattern, Between Left Pattern, Between Right Pattern, Header Pattern, Start coordinate, End coordinate from the same page.
- You can now test configuration on current image from same page. Column/row overlays are now displayed depending on the selected cell.
- Ephesoft now supports configuring rules from multi page and multiple files.

Extraction Rule							
Rule Name:		INVOICE	E				
Start Pattern:							
	ACME Company			Invoice No:	5432000		
End Pattern:	Belverly Hills Blvd			Invoice Date:	04/06/08		
	Irvine, CA 90210			PO Number:	2005012345		
Extract Repeating Tables:	Tel: 949-331-7500	)					
Table Extraction API:							
	Part No	Quantity	Unit Price	Description	Discount	Total	
Coordinates Header Extraction	9981000000156	50	\$0.16	FS B&W Card Stock	0.00%	\$8.00	
Column Configuration	9981000001990	9	\$1.09	Cutting-Per Reim	0.00%	\$9.81	
Basic Configuration							
Table Column: Part No 💌							
	(513.)J	_			Sub Total:	\$17.81	
Column Header					Tax 7.75%	\$1.38	
	77.92e	<u> </u>			Total	\$19.19	

#### **Multiline Extraction Support in Tables**

There are tables where headers are present horizontally as well as vertically; i.e., multiple line headers.

Ephesoft Transact v4.1.0.0 has been enhanced to support tables with multiline headers. You now have more configuration options for extraction of such tables.

Now, you can configure tables with multiline header and extract:

- Horizontal columns and their corresponding values
- Vertical columns and their corresponding values.

#### Table Column Extraction Rule UI Revamp and Extraction Support for Tables Containing Horizontal and

#### Horizontal + Vertically Aligned Columns

There are tables where headers are present horizontally as well as vertically; i.e., multiple line headers.

Ephesoft Transact v4.1.0.0 has been enhanced to support tables with multiline headers. You now have more configuration options for extraction of such tables.

Now, you can configure tables with multiline header and extract:

#### • Horizontal columns and their corresponding values

Vertical columns and their corresponding values.

#### Extraction Support for Tables with Headers Wrapped in Multiple Rows and Table Data Not Aligned to Header

There are tables where data in the column is not aligned under the header.

Earlier, column header extraction rules used to fail while trying to extract data for such tables. Column coordinate and regex based extraction could be used in such cases but they had their own limitations. They both used to fail if column ordering changed. Column coordinate extraction also used to fail if data was found slightly left or right of the defined column boundaries.

Ephesoft Transact v4.1.0.0 has been enhanced to support tables with above attributes. You now have more configuration options for extraction of such tables.

#### **OCR Confidence Being Accounted for Table Extraction**

With Ephesoft Transaction v4.1.0.0, OCR Confidence is being accounted for while performing table extraction.

#### **Batch Class Management**

#### Ability to view samples for Test Extraction on the UI

Earlier, the **Test Extraction** screen used to display the batch class tree pane as shown in the image below.



Now, the batch class tree pane is hidden and the **Test Extraction** screen covers the whole window.

(CSL LAURALIO)
Extract Download Clear
Workflow: ON  Classification Types: Search Classification * Extraction Plugins: Kegual Hoge Extraction A February Plugins: Kegual Hoge Extraction A Februa
OCCL (Invoice-) (Proc)       * Extraction CIP- Dicks Table       * Page ID     Page Name     Value Extraction Type     Confidence       * 00     US-Invoice-00     5432000     Invoice No     Regular/Rege     100       * 00     US-Invoice-00     5432000     Invoice No     Regular/Rege     100       * 1     Hold Status     Extraction Type     Confidence     ACME Company     Invoice No:     5432008       * 1     Hold Status     Extraction Type     Invoice No:     5432008     Invoice Date:     0.06008       * 1     Hold Status     Extraction Type     Invoice Date:     0.06008     100       * 2     Hold Status     Status     Status     Test 465335-7500     Status     100
9881000001800         6         \$1.09(2uting-Per Reim         0.00%         \$55.81           0         0         0         \$1.09(2uting-Per Reim         0.00%         \$55.81           0         0         0         0         \$1.09(2uting-Per Reim         0.00%         \$55.81           0         0         0         0         0         \$1.09(2uting-Per Reim         0.00%         \$55.81           0         0         0         0         0         \$1.09(2uting-Per Reim         0.00%         \$55.81           0         0         0         0         0         \$1.09(2uting-Per Reim         0.00%         \$55.81           0         0         0         0         0         \$10.10%         \$10.10%         \$10.10%         \$10.10%           0         0         0         0         \$10.10%
The <b>Test Extraction</b> screen has two sections.
Results grid on the left
Image view pane on the right
When the user clicks <b>Extract</b> , results are displayed row-wise in the results grid on the left and the corresponding image is displayed in the image view pane on the right. Overlays appear on the displayed image based on the extracted values.
By default, the first row from the results grid is selected and the image view pane displays the image corresponding to the first result.
There are two options available for extracted values:
Extracted DLF
Data Table
Ability to view samples for Test Classification on the UI Earlier, the Test Classification screen used to display the batch class tree pane as shown in the image below.
Powered by Echecold Now, the batch class tree pane is hidden and the <b>Test Classification</b> screen covers the whole window.

	= Ef	ohesot	ft Open	Apply Dep	oloy Add	Сору Ехр	ort Delete	Learn File(s) View Learn File(s) Close Test Extraction Close	
	Test Classifie	cation							
	Classify Download Clear								
	Workflow :	ON	<ul> <li>Class</li> </ul>	sification Type	s: Search Cla	ssificatior 🔻			
	DOC1 (Invoice Classificat	-Non-US) Document	Page Name	Page ID	Page Clas	Page Confi	Classificat		
	Search Cla	48.39	Multipage	PG0	Invoice-No	57.88	Multipage	505 Te: ALTONE DUTYED GENERAL-OR DUTYE TO YEAR AND YEAR AND TO THE DUTYE AND YEAR AND TO THE DUTYE DUTYE AND YEAR AND THE DUTYED AND YEAR AND THE DUTYED AND YEAR AND THE DUTYED AND THE D	
	Search Cla	48.39	Multipage	PG1	Invoice-No	47.58	Multipage	Book To         Days         Op         Terms         Remarks         Kind Date         Stigs Date           NEW9         001         P         MCD         COD COM/ANY CHECK-IS DBC         REDM SHP 316         3/1411	
	Search Cla	48.39	Multipage	PG2 PG3	Invoice-No	48.38	Multipage	KER HIP TOAT	
	Search Cla	48.39	Multipage	PG4	Invoice-No	49.12	Multipage		
	Search Cla	48.39	Multipage	PG5	Invoice-No	46.01	Multipage	KUEN BUE 216	
	Search Cla	48.39	Multipage	PG6 PG7	Invoice-No	47.24 50.77	Multipage	C Sector State	
	Search Cla	48.39	Multipage	PG8	Invoice-No	46.87	Multipage	>	
	Search Cla	48.39	Multipage	PG9	Invoice-No	42.78	Multipage	>> 004497 23322 177 198 06 28 50 144444	
								Puter 5 Court Presaying Cire Weiget Ship Via TOTALS	
								Сильного во выдатительного простато по октоности по состатите сознани. Вомота на водатите в долгато то посто от садаталия по сознаят.	
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The res		licatio	n scree	ก กลร เ	.wo sec	lions.			
•	Results	s grid o	n the le	eft					
٠	Image	view p	ane on	the rig	ght				
			- · · · · ·						
When th	ne user	clicks	Classify	, resul	ts are o	displaye	ed row-	-wise in the results grid on the left and the corresponding	
image is	s displa	yed in t	the ima	age vie	w pane	e on the	e right.	Overlays appear on the displayed image based on the	
extracte	ed value	es.							
	dofault	the fire	t row fr	om tho	roculto	arid ic c	alactad	and the image view pape displays the image	
	respond	ding to t	the first	rocult	results	gilu is s	electeu	and the image view parte displays the image	
	respond			result.					
						_	_		
Ability t	o View	ı, Dowı	nload, a	and De	elete Sa	mples	for Lea	arning from UI	
Earlier y	Earlier you were unable to view learned files from Ephesoft User Interface. A new feature has been added that								
enables	enables you to view files that were learned and used for Test Classification and Test extraction and correlate and								
map the	e result	s for th	iose.						
A new c	olumn	Action	<b>s</b> has b	een ad	ded to	the <b>Up</b>	load Fi	ile(s) grid.	
		E	phesoft	Open A	pply Deploy	Add Copy	Export Delete	Learn File(s) Close Test Classification Test Extraction Close	
		TechP	TRANSACT Pubs-BCC	Name	De	scription	Minimum Confide	ence Number of Alternate Additional Configurations Roles of Machine Learn Global	
		Doi Mo	cument Types dules	Invoice	US	Invoice	8	5	
		🗅 Em	nail Configuration anner Profiles						
		CN	IIS Import tch Class Field						
			ten class rieu						
		Þ							
				4					
				4 0 Pa	age 1 of 1 O	Display	ing1 - 1 of 1	Showing 15 - Records per page	
				Upload File File Name	(\$)		Pac	ge Type Image Classification Lucene Learning Actions	
				US-Invoice-00	00.tif		FIR	IST true true 😭 🛓 👁	
				1					
		Power	red by Ephesoft						



• BC0: GlobalBatchClass - Global Batch Class

Batch Class PPM Comparison	-	Identifier	Name	Description	Drop Folder	Version	Priority	Current User	Encryption		
h		BC0	GlobalBatch	Global Batch	WWIN-IGPCI9	1.0.0.0	1				
BCT -0		BC1	MailroomAut	Mailroom Aut	WWIN-IGPCI9	1.0.0.0	1				
BCD -0		BC2	SearchableP	Searchable	WWIN-IGPCI9	1.0.0.0	1				
BCC -0 BCB - 4		BC3	GridComputi	Grid Computi	WWIN-IGPCI9	1.0.0.0	1				
BCA TO BCS TO		BC5	dc_test	dc_test	WWIN-IGPCI9	1.0.0.0	1				
BC7 - 4 BC8 - 3		BC6	testclass1	testclass1	WWIN-IGPCI9	1.0.0.3	1				
BC5 -0 BC3 -0		BC7	testclass2	testclass2	WWIN-IGPCI9	1.0.0.5	1				
8C2 -0 8C1 -0		BC8	testlearning	testlearning	WWIN-IGPCI9	1.0.0.9	1				
800 -0		BCA	test4	testclass1	WWIN-IGPCI9	1.0.0.4	1				
0 25 50 75 100 Page per minute	1	BCB	wrappeddata	wrapped data	WWIN-IGPCI9	1.0.0.13	1				
PPM of Selected Batch Class		RCC	TechPubs	Tech Pubs	WWIN-IGPCI9	1004	1				
	-	C Displaying1 - 15 of 19 Showing 15 - Records per page									
	lr.	nport Batch Class									
	- E	Select Files OR									
	ſ										
		Drag and Drop Files Here									
	- 6										

The **Global Batch Class** has the following noticeable attributes:

- This batch class is only visible to an Administrator or Super-Admin user.
- You cannot edit any fields of the Global Batch Class.
- You cannot assig any roles to this batch class for configuration.

- You cannot configure the Drop folder location.
- You cannot execute batches using the **Global Batch Class**.

All the documents types defined inside the **Global Batch Class** are global and can be inherited by any other batch class in the application. Any modifications to document type configurations have to be done from the **Global Batch Class** and not in the batch class using the document types inherited from the **Global Batch Class**.

All the modifications applied in the **Global Batch Class** are automatically reflected in all batch classes using the document types inherited from the **Global Batch Class**.

Any learning done in **Global Batch Class** is copied to the batch class using the inherited document types defined in **Global Batch Class**.

You can only export document types from the **Global Batch Class** and not the whole batch class. This enables you to have the flexibility to export only the desired document types. The document types exported from **Global Batch Class** are exported only as **Global Document Type**.

You can import a **Global Document Type** only inside the **Global Batch Class**. If you try to import the **Global Document Type** inside any local batch class, an error message is displayed.

When you import a **Global Document Type** from Test to Production, the import happens only as a global batch. The contents of the batch class being imported are merged to the existing **Global Batch Class** as there can be only one **Global Batch Class** in an application.

#### **Batch Instance Management**

#### Next Batch Selection

Earlier, while opening a batch from **Batch Instance Management** screen, user was shown the desired batch for review or validation. Once the user completed review/validation or clicked **Next Batch**, user was taken to the next highest priority batch.

The next batch could be of the same state or different which totally depended upon the priority of batch. At times, it was noticed that the system got stuck in a cyclic loop between two high priority batches having the latest modified date.

Also, while opening a batch from the **Batch List** screen, user was shown the desired batch for review or validation. Once the user completed review/validation or clicked **Next Batch**, user was redirected to the **Batch List** screen.

With Ephesoft v4.1.0.0, once the user is done with review/validation or clicks **Next Batch**, the next batch displays irrespective of the request source.

The **Next Batch selection method** option has been added to achieve this. This option allows you to select the criteria based on which the next batch is fetched and displayed.

DOC1 One	ID BI7 Name BCA_ephesoft_2016-0 P Document Type Fuzzy Search One Table Action Content of Conte	hal Application hing Batch selection method ine Learning cuts	Highest Priority Order Order Order Order Order Order Order Order Order	Ascending Descendir	P. D. BOX 430903 CINCTINNETL, OH 452 800-869-8429 content tes account tes 07207 07207 9 content tes account tes 07207 07207 9 content tes 2 07207 9 content tes 2 07207 9 content tes 2 07207	6 E2/4 втор вы облико соет 1 6/10200 1 г важитиент систомия и ли. им торе UA-OLEP-CULP	WORLE NO 3855449248 WHORLE ANT 9/02/14 TRANS JE 10/10/14 JE 10/10/14 JENG 1
	IndexOne		0011         MB         B         The inservation in the i	Base         Base           Base <th>THE         Quarteries           0.9         WHENDEY           2477         1           0.9         WHENDEY           2477         1           0.11         1           0.12         1.397           57935         1.397           5945         1.397           5945         1.397           5945         1.397           5945         1.397           5945         1.397           <td< th=""><th>Subsetting         State           100</th><th>Produce         1           1         1           1         1           1         1           1         1           1         1           1         1           1         1           1         1           1         1           1         1           1         2           1         2           1         2           1         2           1         2           1         2           1         2           1         2           1         2           1         2           1         2           1         2           2         2           2         2           2         2           2         2           2         2           2         2           2         2           2         2           2         2           2         2           2         2           2         2           2         2<!--</th--></th></td<></th>	THE         Quarteries           0.9         WHENDEY           2477         1           0.9         WHENDEY           2477         1           0.11         1           0.12         1.397           57935         1.397           5945         1.397           5945         1.397           5945         1.397           5945         1.397           5945         1.397           945         1.397           945         1.397           945         1.397           945         1.397           945         1.397           945         1.397           945         1.397           945         1.397           945         1.397           945         1.397           945         1.397           945         1.397           945         1.397           945         1.397           945         1.397           945         1.397           945         1.397           945         1.397           945         1.397 <td< th=""><th>Subsetting         State           100</th><th>Produce         1           1         1           1         1           1         1           1         1           1         1           1         1           1         1           1         1           1         1           1         1           1         2           1         2           1         2           1         2           1         2           1         2           1         2           1         2           1         2           1         2           1         2           1         2           2         2           2         2           2         2           2         2           2         2           2         2           2         2           2         2           2         2           2         2           2         2           2         2           2         2<!--</th--></th></td<>	Subsetting         State           100	Produce         1           1         1           1         1           1         1           1         1           1         1           1         1           1         1           1         1           1         1           1         1           1         2           1         2           1         2           1         2           1         2           1         2           1         2           1         2           1         2           1         2           1         2           1         2           2         2           2         2           2         2           2         2           2         2           2         2           2         2           2         2           2         2           2         2           2         2           2         2           2         2 </th
Powered by Ephesoft							~

#### Batch in Suspended Status

Earlier, if a batch needed external inputs for review/validation and the operator was unable review/validate the batch for any reason, there was no provision to mark the batch so that the batch could be picked by another operator or the administrator for successful review/validation.

A new feature has been introduced in Ephesoft v4.1.0.0 that allows you to suspend a batch in review/validation and assign it to another operator.

Using this feature, you can:

- Send an email to the user whom the batch is assigned.
  - In case of groups, the email is sent to all users in the group.
- Add a note while suspending a batch which is part of the mail sent and is also visible on the batch list and batch instance screen.

#### Installer

#### Ability to Run Ephesoft Transact as a Non-Root user

You can now run Ephesoft Transact as a non-root user.

#### Ability to Continue Installation Offline without Internet Access

Ephesoft now supports offline installation in case you do not have internet access.

## 6. Appendix C - Bug Fixes

## **Client Bugs**

JIRA ID	Axosoft ID	Bug Description
EEN-2873		A feature request was made by a customer to add Batch Class ID to available columns on Batch Instance Management screen. Earlier, Batch Class Name column was there but Batch ID column was not there. This was requested because when overriding an existing Batch Class, the Batch Class Name remained the same, only the Batch Class ID changed.
EEN-4483	#EPHE-13467	Currently in Ephesoft, if user configures Batch Class Field as a drop down list and validation pattern is configured on the drop down, then the validation pattern would not get applied when user selects the value from drop down. As per new requirement, the validation pattern is also applied to drop down list.
EEN-4484	#EPHE-13454	An issue related to Batch Class Fields was reported where empty string Regular Expression was not working in Batch Class field dialog. Upon further investigation it was noticed that issue was occurring because the Regex validation rule was not being enforced for an empty string Regex. Code was optimized to fix this issue.
EEN-4514	#EPHE-13465	An issue related to Batch Class Fields Dialog Box was reported where the customer wanted to increase the size of the dialog box to show all fields. The customer wanted the operator to be able to see all Batch Class fields in one view by stretching out the size of the Batch Class field dialog box without having to scroll. Now, the default size of the Batch Class Field(s) dialog box has been maintained as is but the dialog box can be resized to view all fields without scrolling. After making changes to the size of the dialog box, the size is stored in a cookie and made available in the future.
EEN-4532	#EPHE-13508	An issue related to Force Review was reported. If multiple index fields were marked for 'Force Review' on Batch Class Management screen, then the 'ForceReview' tag was being set to 'True' only for the first field that was being marked for Force Review on the UI. The value for 'ForceReview' tag was not being set to 'True' for subsequent fields.