Kofax Transformation Modules

6.3.0

Product Overview & New Features

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Product Overview

Kofax Transformation Modules streamlines the transformation of business documents into structured electronic information by automating the process of document classification, separation and extraction.

Whenever incoming documents drive transactions, organizations will benefit from:

- Reduced operating costs
- Increased productivity
- Better data quality
- Improved compliance

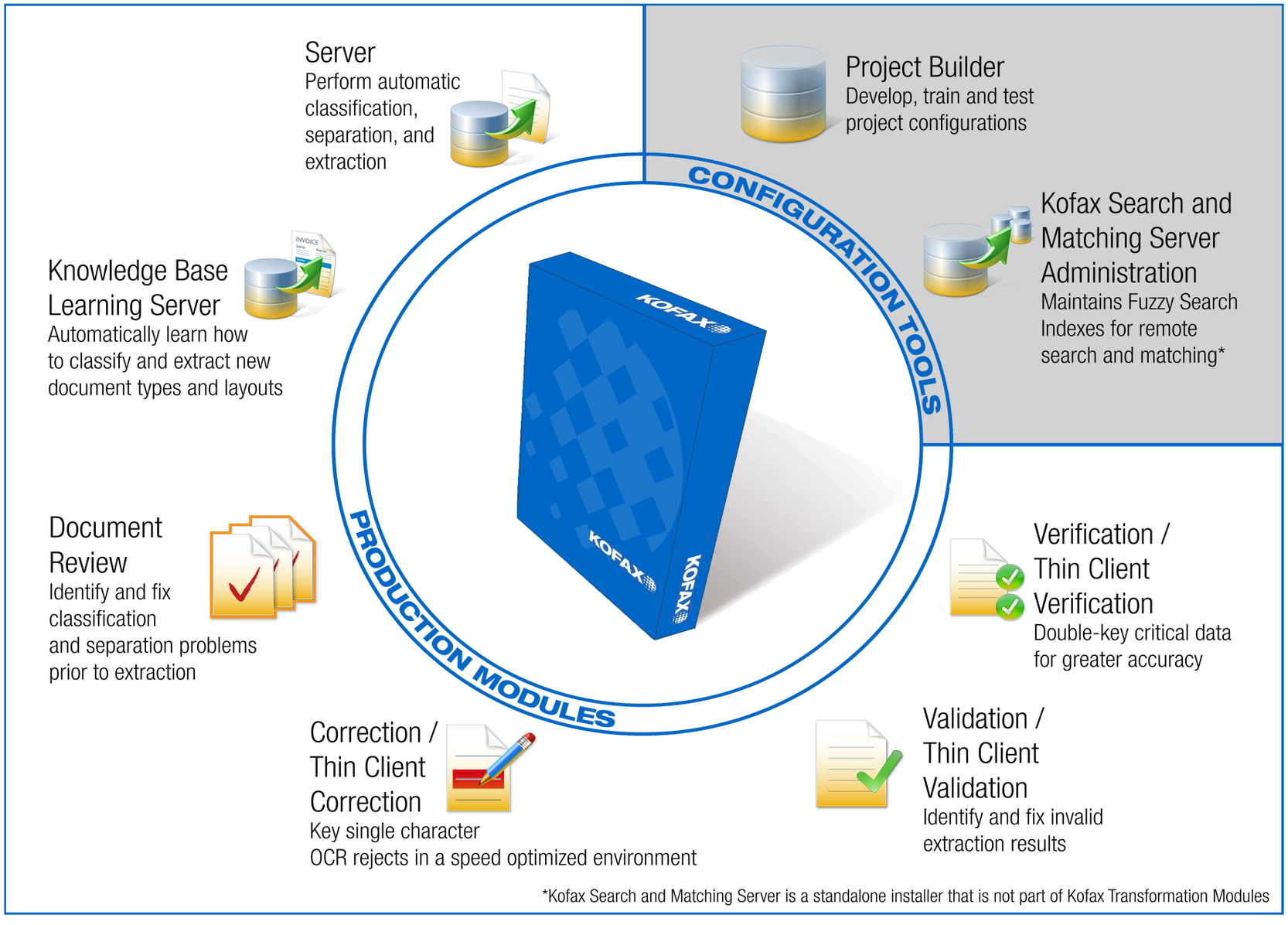
Kofax Transformation Modules is the most complete and versatile document transformation offering on the market, enabling the processing of forms, invoices, correspondence and other document types on a single platform. Using learn-by-example techniques for document classification, separation and extraction, solutions can be configured and optimized quickly and effectively.

Kofax Transformation Modules provides a seamless integration with Kofax Capture, giving access to the widest range of document scanners and back-end storage solutions, as well as benefiting from its distributed capture, high availability and enterprise capabilities.

Paper-based and electronic documents can be scanned or imported, creating a series of scanned image files. Kofax Capture then routes these image files through Kofax Transformation Modules where a batch is separated into documents, classified, and then extracted.

These classification, separation, and extraction results are presented for review by users of the Document Review, Correction or Thin Client Correction, Validation or Thin Client Validation, and Verification or the Thin Client Verification user modules, depending on the project configuration.

There is no limit to the number of Validation, Verification, Document Review, or Correction workstations that can be deployed.



*Kofax Search and Matching Server is a standalone installer that is not part of Kofax Transformation Modules

Once all documents are successfully processed, the accurate and fully-validated data and images are exported to a back-end system using Kofax Capture.

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Protected Projects

Protecting a project enables users to ensure that all sensitive data in a project is encrypted and inaccessible to a customer, but the project is still fully functional. They cannot access this information through script or by any other means.

When a project is protected, a password is provided. This password ensures that other users cannot access the project and it also provides a way for the project to be decrypted at a later point, if necessary.

Customers can work with protected projects in a similar way to normal projects.

- In the Document Viewer, protected documents are indicated with a lock icon.
  If a user opens a protected document in Project Builder, the image is displayed as a dummy image and the text is not legible.
  In the XDocBrowser, the mouse tooltips do not show meaningful text.
- Protected documents in Document Sets behave like all other documents. The user can select, unselect, delete, or move a protected document.
- Users can add additional documents to the training set and these are visible to the user. A project can have a mix of protected and non-protected documents in a document set.
- The protection does not apply to all aspects of a project. Users can add, remove, and rename classes, fields, and locators as necessary.
- Users can train a project. Users cannot see protected training documents but this does not restrict the user from training the project.
- Users can perform benchmarks using non-protected documents only.
- If a project has online learning enabled, it is mandatory to update the online learning path for the protected project.
  This ensures that there are no training document issues between the protected project and the original copied project.

Customers are not able to do the following for protected documents.

- Users cannot test locators, perform extraction, or process protected documents.
- Users cannot perform OCR on protected documents.
- Users cannot perform extraction benchmarks using protected documents.
- Users cannot perform conflict resolution between a protected document and an unprotected document.
  In this situation, the only solution is to delete the protected document because its image is not visible.
- Users cannot perform clustering on protected documents.
- Users cannot convert a Test Set into a Training Set, even if it contains a mix of protected and unprotected documents.

Note If a project has external training sets, it is not possible to protect that project. Either make the external training sets internal, or remove them altogether before protecting a project.

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Enhanced Bar Codes

The Enhanced Bar Code recognition engine is configured in the Kofax Capture batch class, and bar codes are extracted during Kofax Capture Scan. These results are then available to use in Kofax Transformation Modules as input for a Bar Code Locator.

Kofax recommends that the Enhanced Bar Code recognition engine is used as input for the Bar Code Locator when bar codes are not easily recognized using the default FineReader recognition engine.

If a bar code is extracted using the Enhanced Bar Code recognition engine, either standalone, or paired with FineReader, several limitations are encountered.

- There are issues with bar code coordinates when the Kofax Capture Recognition Server is involved.
  Because of this, the results are available but voting cannot be carried out based on bar code positions.
  For the best results, use scan-time bar code detection in Kofax Capture. This ensures that the enhanced bar code extraction works without issues in Kofax Transformation Modules.
- Orientation coordinates are not returned by the Enhanced Bar Code recognition engine.
  Because of this, bar codes may not have the correct highlighting, and vertical bar codes are never highlighted correctly.

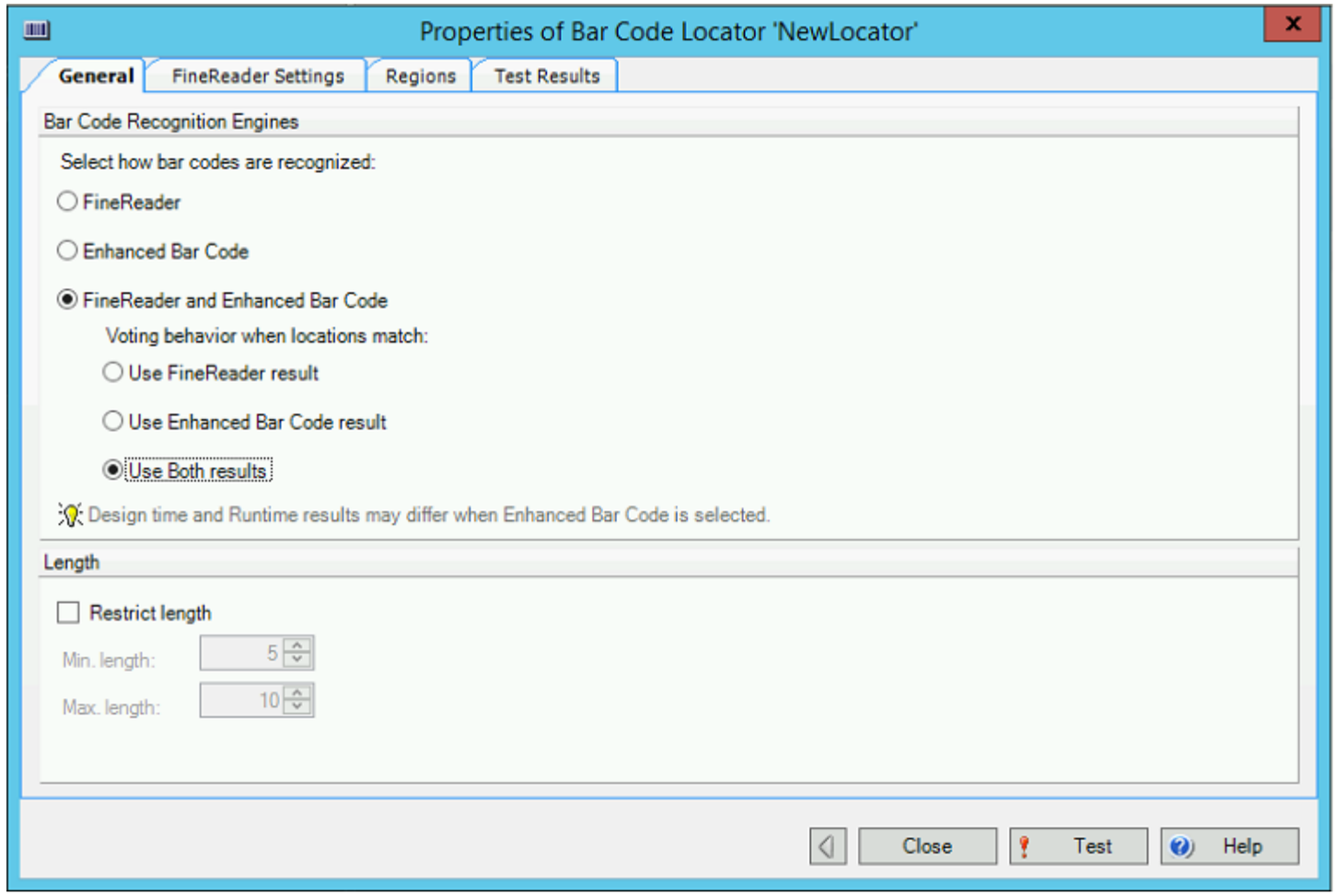
Tip The height and the width of a bar code are not returned by the Enhanced Bar Code recognition engine with Kofax Capture 11.0 and its installed version of VRS (5.1.1). However, if the software is upgraded to Kofax Capture 11.0.1 or later, and VRS 5.1.2 or later, the height and width of a bar code are usually returned and the bar code is highlighted correctly, unless the bar code is at an odd angle. This also means that bar code location matching and voting is improved for the bar codes detected by the Enhanced Bar Code recognition.

When a Bar Code Locator is configured, a user has the option to select FineReader recognition only, Enhanced Bar Code recognition only, or both. Selecting both recognition engines enables automated voting so that the best result is selected, regardless of the recognition engine.

If both bar code engines are used, it is possible that they extract the same bar code at the same location. As a result, there are additional options for voting when the bar code locations match.

The option to use both engines requires a script solution. The script needs to use some sort of logic to help decide which result to use. For example, use the result with the higher confidence. If the confidence of both results is the exact same, specify one engine over the other.

Note Upgrade to Kofax Capture 11.0.1 and VRS 5.1.2 to ensure that the height and the width of a bar card are returned by the Enhanced Bar Code recognition engine. These coordinates help with voting.



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Limited to Online Learning Mode

By default, Project Builder is run so that all administrative functionality is available to all users. However, an organization may have users who specialize in maintaining online learning, but have no need or interest in modifying the project configuration itself.

As a result, Kofax Transformation Modules is available in two different modes, each with its own icon.

First, there is the regular Project Builder mode where all aspects of configuration are available.
Typical users opening the Project Builder mode are project Administrators.

With this mode users are able to manage the project hierarchy, including classes, locator methods, and fields.
Users are also able to configure extraction and classification, as well as perform benchmarks for both.

Users are also able to maintain Online Learning alongside all other aspects of project management.

The second mode is called Project Builder (Limited to Online Learning).
Typical users using this mode are those who are interested in maintaining online learning only.

With this mode, users can perform online learning tasks without the risk or worry about making changes to the overall configuration of a project.

In the Project Builder (Limited to Online Learning) mode, users are able to perform the following actions to maintain Online Learning for a project.

- Download and maintain collected training documents.
- View and edit training documents.
- Discard unwanted training documents.
- Manage training conflicts using the best practices for conflict resolution.
- Perform and compare benchmarks.
- Train a project with updated training documents using the best practices for training.

Having these two modes ensures that users with different roles can open different modes and make changes to a project without causing unintended mistakes in areas of the project that are not familiar.

Tip Copy a shortcut of the Project Builder (Limited to Online Learning) mode to the desktop or Start Menu for all users who require this mode.

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