Kofax Transformation Modules

Product Overview

Version 7.0.0

KOFAX

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, vorganizations will benefit from:

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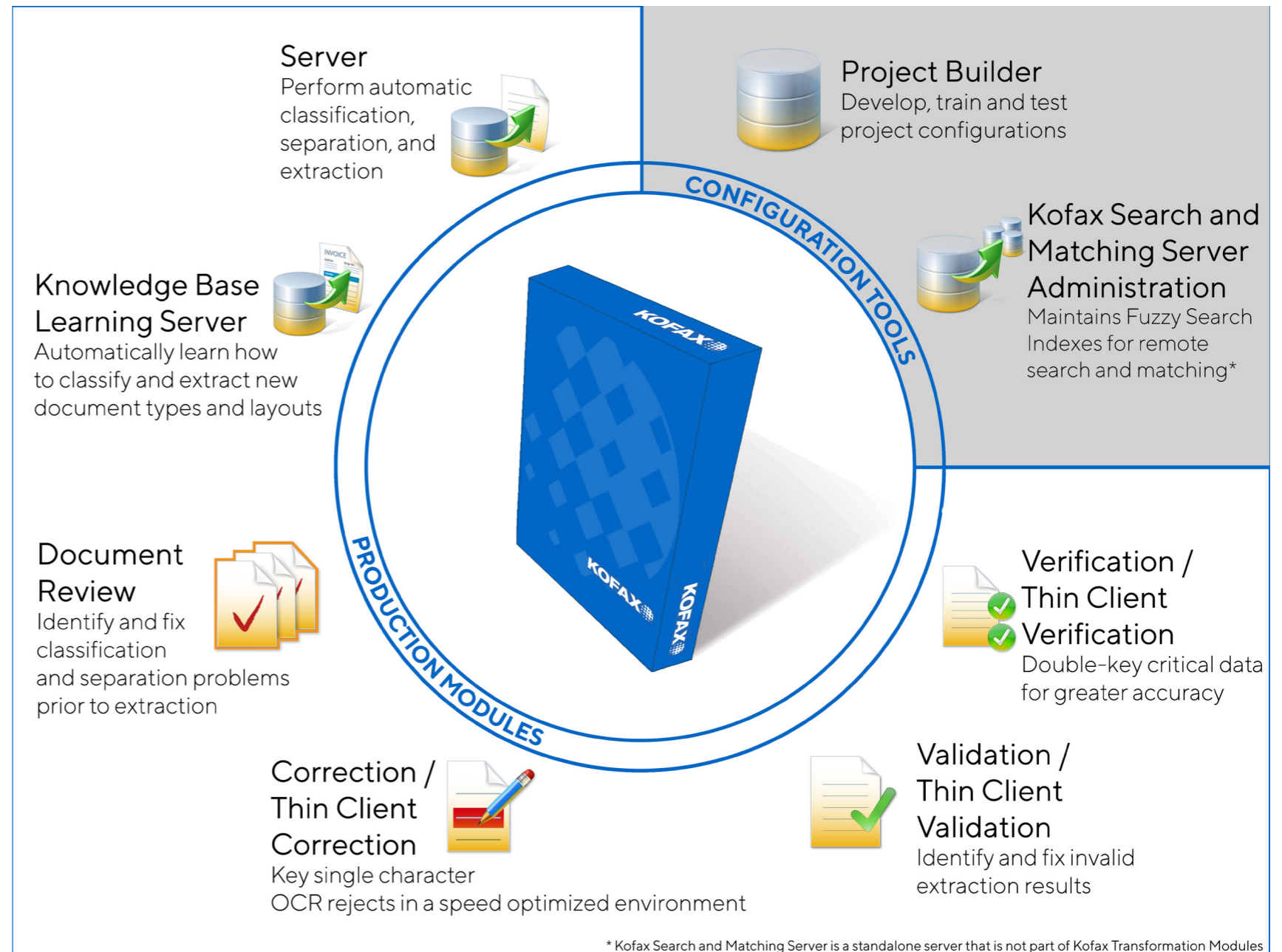
Kofax Transformation Modules provides a seamless integration with Kofax Capture, giving access to the widest range of document scanners and back-end storage solutions, as well as benefiting from its distributed capture, high availability and enterprise capabilities.

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.

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

Server
Perform automatic classification, separation, and extraction

Project Builder
Develop, train and test project configurations

Kofax Search and Matching Server Administration
Maintains Fuzzy Search Indexes for remote search and matching*

Knowledge Base Learning Server
Automatically learn how to classify and extract new document types and layouts

CONFIGURATION TOOLS

PRODUCTION MODULES

Document Review
Identify and fix classification and separation problems prior to extraction

Verification / Thin Client Verification
Double-key critical data for greater accuracy

Correction / Thin Client Correction
Key single character OCR rejects in a speed optimized environment

Validation / Thin Client Validation
Identify and fix invalid extraction results

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

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FormXtra handprint zone recognition

A new zone recognition profile is avilable so that the Advanced Zone Loator can recognize handwritten text.

This new zone recognition profile enables users to extraxt various types of information for a set group of languages. Users can also specify the type of handwriting expected, such as cursive, handprint, or boxed handprint.

This zone profile and an Advanced Zone Locator replaces the deprecated A2iA Zone Locator configured to use the FieldReader functionality.

For example, for a signature field on an American document, a FormXtra zone recognition profile can be configured as follows:

◆ Set the Field Type to Full Name
◆ Set the Language to English
◆ Set the Writing Style to Cursive
◆ Add User dictionaries for names, if available
◆ Set the Name Format to First Last

Similarly, to recognize a Credit Card Number on an order form, configure the FormXtra zone recognition profile as follows:

◆ Set the Field Type to Credit Card Number
◆ Set the Language to French
◆ Set the Writing Style to Boxed Handprint

Additional image cleanup settings are also available so that users can clean images to improve recognition results.

For example, if a line or box intersect some handwritten text, the recognition results may not be adequate for extraction. To reolve this issue, remove lines or boxes to get better recognition results.

It is also possible to remove noise that might appear on a document or to correct a skewed document.

For the best results, rename the zone recognition profile with a descriptive name after it is created.

* A separate volume license is required to use this locator.

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Check Locator

A new locator method is available to process handwritten checks. This locator replaces the deprecated A2iA Zone Locator configured to use the CheckReader functionality. This locator returns many results that are commonly found on a check. A single locator can return data for multiple fields, such as amount, date, payee, account numbers, check numbers, and other relevant check infromation.

The Check Locator has a fully configurable user interface where users can select a country of origin and then configure additional settings relevant for that country.

For example, it is possible to recognize cashing restritcion that are speific to Chilean checks. and RLMC and payor block details for French Checks. Similarly, Brazilian checks have a unique top line as well as the placeof issue and the name of the payor. This is all recognized when the country is set to Brazil. Indian checks require CTS compliance, so whether or not a check from India meets this compliance is calculated.

By default, when the amount is recognized the legal amount (LAR) and the courtesy amount (CAR) are compared to see if they match. The CROSS value in the Test Results is this compared value.

For the best results, map the CROSS value to the amount field This ensures that the amount field always has the best value, even if either the .CAR or LAR are not recognized at all.

In most cases, selecting a value in the Test Results tab highlights the corresponding value on the check.

It is possible to detect the presence of the endorsement or the back side of the check, but no extraction is performed here.This is because this side typical includes a signature which is notoriously had to recognize. As aresult, if the back side is detected, further processing is possible to manually verify the signature or to compare it to a signature on file via script.

For the best results when setting up a new Check Locator, use as many test documents as possible. This ensures that there is a wide array of handwriting samples and checkk layouts to help configure the locator as required.

* Separate volume licenses are required to use this locator.