

MIGRATING TO KOFAX TOTALAGILITY FROM KOFAX TRANSFORMATION & KOFAX CAPTURE

Kofax TotalAgility combines the functionality found across Capture and Transformation into a single platform. If you are a Kofax Capture or Transformation customer, you should consider migrating to TotalAgility rather than continuing to invest more resources into support, maintenance, and upgrades.

Tuesday, June 16, 2020

Presenters: Chad Tucker & Alan Schefers

Webinars

- + **Perceptive Enhancement Pack 2 (EP2)**
 - Wednesday July 1st at 11:00am CT
- + **Making OnBase & Infor Work Together**
 - Wednesday, July 1st at 1:00pm CT
- + **Upgrade to Kofax Process Director 7.8**
 - Wednesday, August 5th at 11:00am CT

Office Hours

- + **Perceptive / ImageNow iScripts Part 2**
 - Friday, June 19th, 1:00pm CT
- + **Microsoft Power Automate (Flow)**
 - Friday, July 17th, 1:00pm CT

Chad Tucker

Manager, Solution Engineering

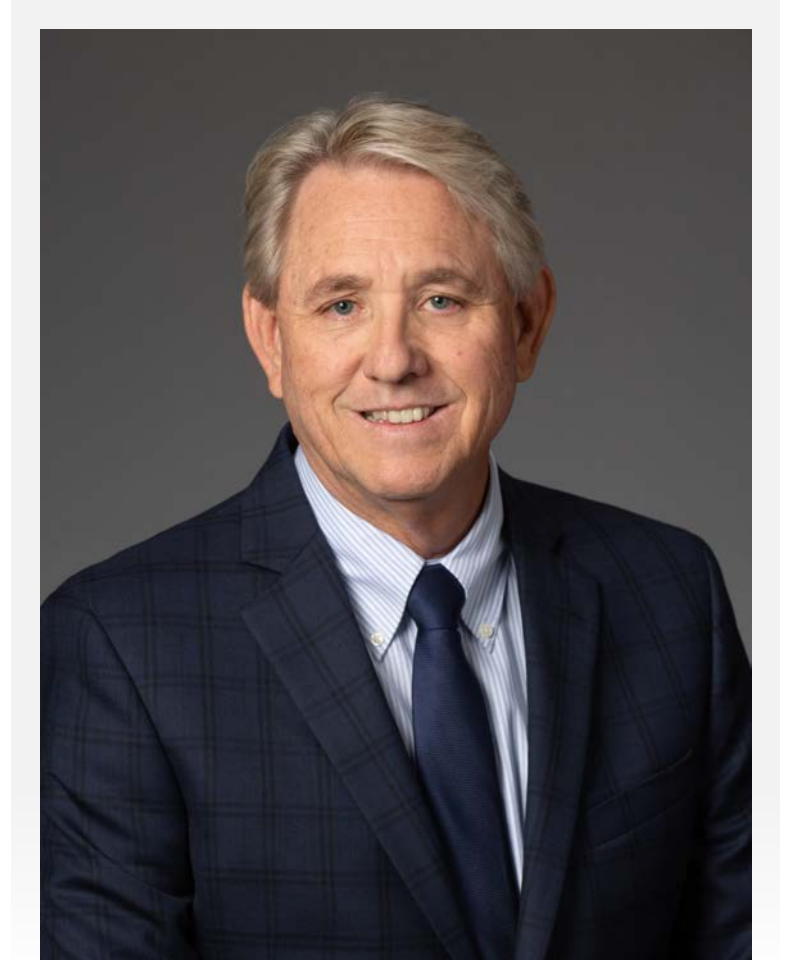
- + Over 10 years of Experience in Business Process optimization and automation
- + Experienced Developer and System Administrator
- + Marine Corps Veteran
- + Enjoys the Beach and Fishing



Alan Schefers

Senior Consultant

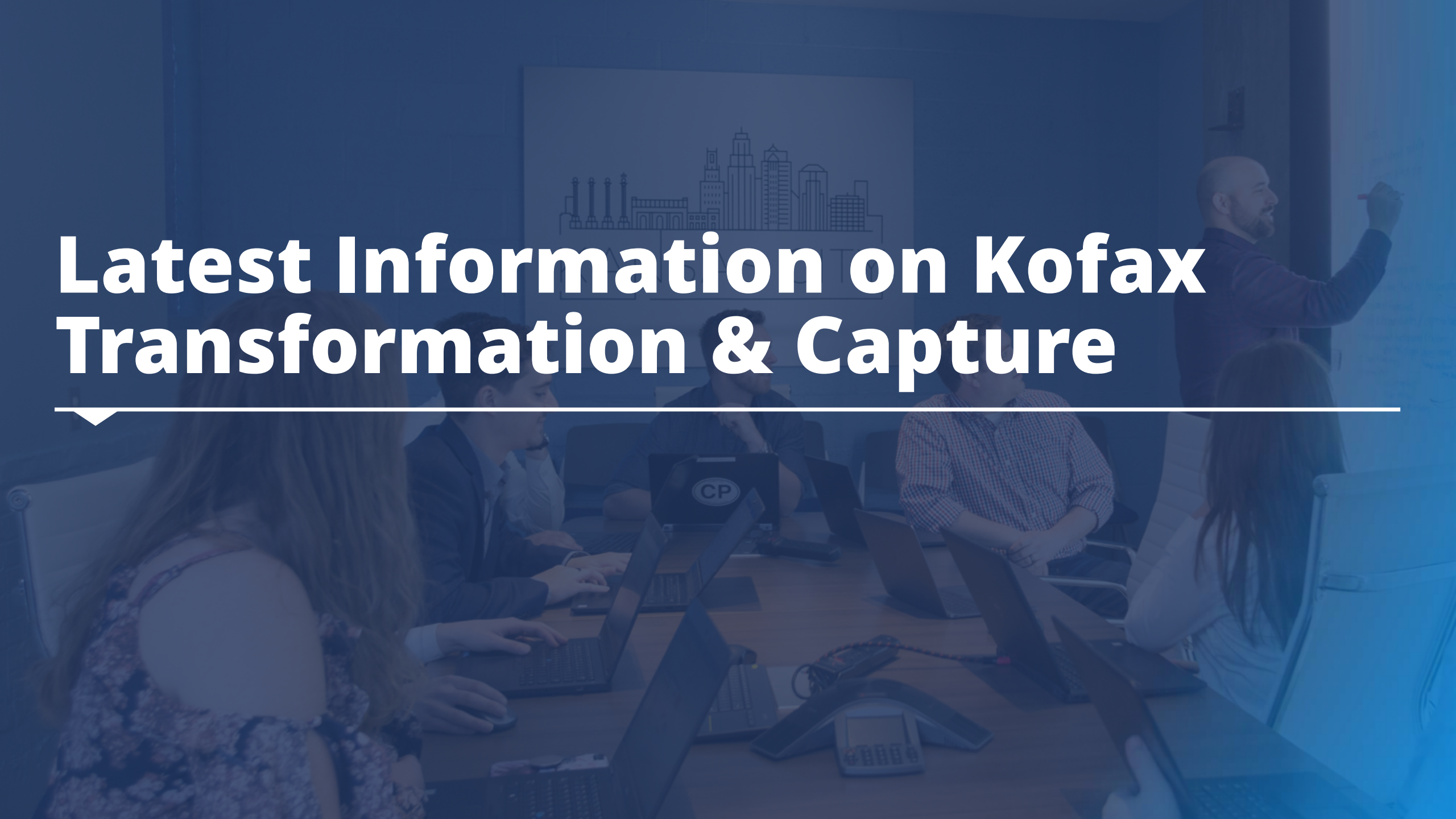
- + Lives in California
- + Likes to Golf and watch Hockey
- + First certified in Kofax Capture in 2006
- + Knowledge in Kofax, OnBase & Yoga
- + "Alan has the technical ability to define, implement and support challenging ECM projects. His "can do" attitude fosters a very healthy client/ vendor relationship. Alan has the ability to translate business needs into technical solutions. He is a customer advocate who always has the customer's best interest in mind. I would highly recommend Alan. – Pete Pappas



- + **Latest Information on Kofax Capture & Transformation**
- + **Kofax TotalAgility Capabilities & Features**
- + **Kofax TotalAgility 'Move-Up' Program**
- + **Migration Considerations & Planning**
- + **Summary & Questions**



Latest Information on Kofax Transformation & Capture



- + **Kofax Capture is an industry leading capture platform that speeds the processing of paper and electronic documents.**
- + **For data capture, the solution extracts important information such as machine printed text, bar codes, hand printed words and even checked boxes.**
- + **Tight integration with virtually all capture channels – High speed scanners, email, web service calls, or mobile devices.**
- + **Kofax Capture provides efficient and automatic data export to a wide range of ECM, ERP, BPM and workflow solutions.**

- + **Current version of Kofax Capture is 11.0.1 Service Pack 1, Fix Pack 1 as of October 2019**
- + **New features in the current release:**
 - **Administrative and Login audits**
 - **Separate database for User Tracking statistics**
 - **Batch class versioning**
 - **Security Boost enhancement**
 - **Improved usability for Scan Settings tab interface**
 - **General enhancements**
 - **Updated VRS software**
 - **Updated ABBYY FineReader OCR engine**
- + **Kofax does not have any plans of discontinuing Kofax Capture**

- + **By leveraging machine learning and artificial intelligence, Kofax Transformation Modules extend the capabilities of Kofax Capture**
- + **Kofax Transformation intelligently recognizes and understands any document to:**
 - **Improve information visibility by use of a customizable validation form**
 - **Reduce document classification/separation and data entry costs using trainable document separation and extraction**
 - **Increase productivity by eliminating manual validation or keying from image**
 - **Increase data quality for fewer errors by use of the Search and Matching server**

- + **Current version of KTM is 6.3 Service Pack 1, Fix Pack 6 this release is as of May 15th, 2020**
- + **Some of the new advancements in this release:**
 - **Natural Language Processing**
 - **Enhanced Bar Code engine**
 - **New fuzzy search database**
 - **New Address Locator**
- + **Kofax does not have any plans of discontinuing KTM**

USE CASE: INVOICE PROCESSING



Here is an example of a KTM project that processes invoices.

First Tab of KTM Validation Form is Invoice header Information

The screenshot displays the KTM Validation Form interface. The form is divided into several sections:

- Classification Result:** The document was classified to the file. 18 fields valid, 9 fields invalid, 25 fields read-only.
- PO Data:** PO Number / Sub: LAMAIL0130, Job: LAMAIL0130, PO Vendor: [blank], PO Vendor OK: [checked], InvoiceType: [blank].
- Invoice Data:** Company: UOI, Invoice Number: 01562844, Invoice Date: 06/01/20, Account Number: [blank].
- Vendor Inquiries:** Vendor: [blank], Address: [blank], City: [blank], State: [blank], Zip: [blank].
- Exceptions and No:** Routing Code: [blank], CFC: [blank], Remarks: [blank].
- Costs:** Total: 207.99, Freight: 0.00, US Add-on Costs: 0.00, US Tax: 0.00, US Misc: 0.00, Canadian Add-on Costs: 0.00, PST Tax: 0.00, CAN Misc: 0.00, Value Added Tax: 0.00, Subtotal: 207.99.

At the bottom of the form, a validation error is displayed: **Possible Credit but no negative amount**. The total amount of 207.99 is also shown in the bottom left corner.

USE CASE: INVOICE PROCESSING



Here is an example of a KTM project that processes invoices.

Second tab is Line Item information

The screenshot displays a software interface for invoice processing. It features a table with the following columns: Create, Status, Line, Item, Description, GLAcct, UoM, Unit Price, Open Qty, Open Amt, Total Price, JobNumb, WorkOrder, PhaseCod, and Item Type. The table contains one row with the following data: Create: M, Status: (empty), Line: 001, Item: 101-TSC20, Description: GRIP TAMPERS, GLAcct: 607056202, UoM: EA, Unit Price: 5.1900, Open Qty: 4.0000, Open Amt: 0, Total Price: 20.7600, JobNumb: (empty), WorkOrder: W623309, PhaseCod: (empty), Item Type: (empty). Below the table, there are buttons for 'Copy Lines', 'Match All', 'Clear Lines', and 'PCLineTotal'. A summary bar at the bottom shows a total of 31.71 and a message: 'Possible Credit but no negative amount'. On the right side, there is a preview of an invoice from ADI, showing the company name, logo, and a 'THANK YOU FOR YOUR ORDER' message.

Create	Status	Line	Item	Description	GLAcct	UoM	Unit Price	Open Qty	Open Amt	Total Price	JobNumb	WorkOrder	PhaseCod	Item Type
M		001	101-TSC20	GRIP TAMPERS	607056202	EA	5.1900	4.0000	0	20.7600		W623309		

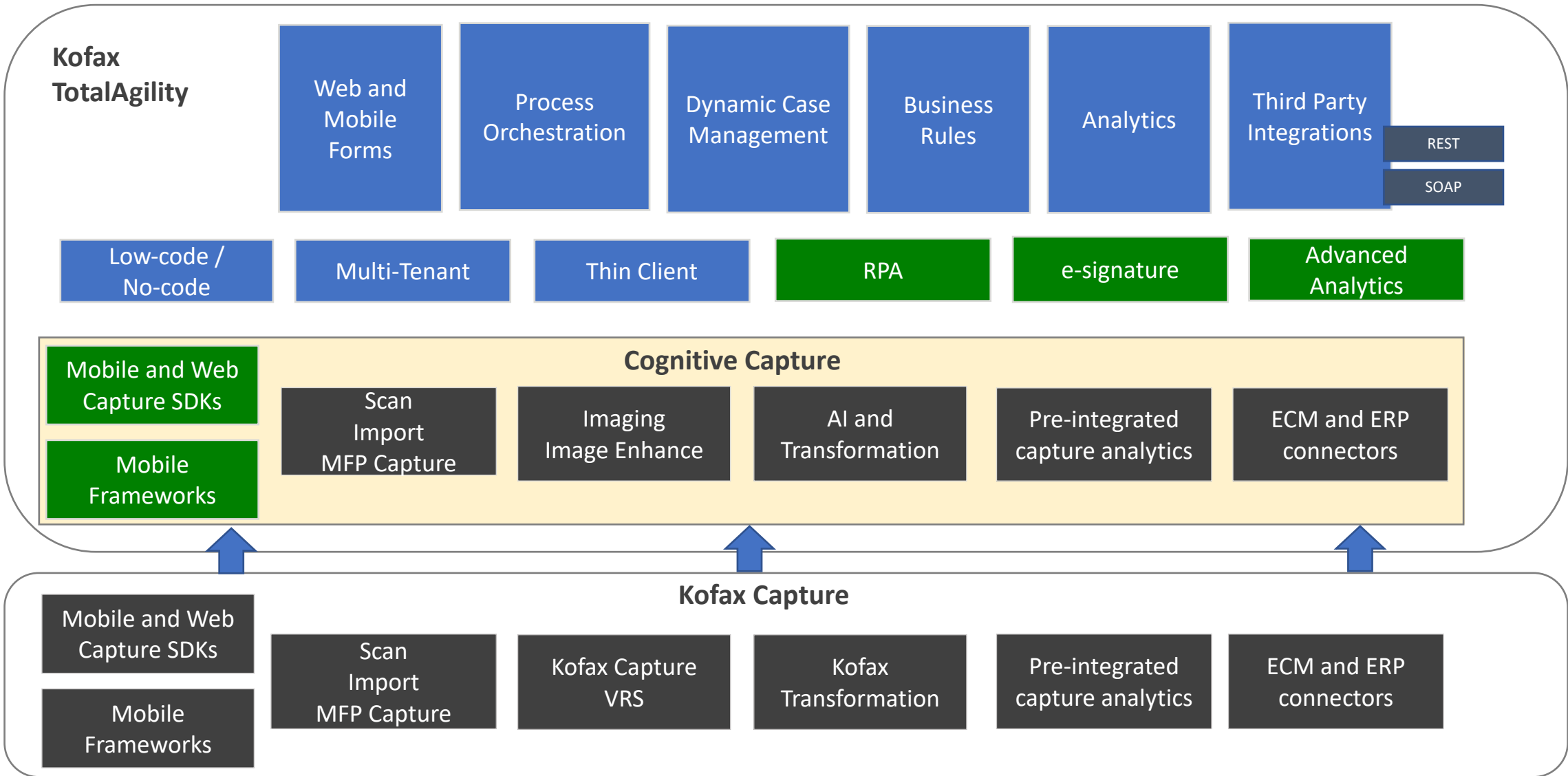
Summary: 31.71
Possible Credit but no negative amount



Kofax TotalAgility Capabilities & Features

Kofax TotalAgility is a highly flexible and versatile content and business process automation platform that combines intelligent data capture with advanced OCR, digital workflow management, and process intelligence.

Product Comparison TotalAgility vs. Kofax Capture



TotalAgility Cognitive Capture



Acquire

Capture Documents

Paper

Fax

Mobile Devices

Digital Scanners / MFPs / MFDs

PDF / MS Office / TIFF / JPEG files

Emails

Access Electronic Data

Databases

Citrix

Websites, Portals

Enterprise (SAP, Oracle) & Legacy (AS400, Mainframe) Systems

Data files (Excel, XML, JSON, EDI)

Understand

Machine Learning

Image Perfection

Classify Documents

Separate Documents

Extract Information

Evaluate Results

Manage Exceptions

Integrate

ERP / CRM / LOB

ECM & Records Management

Databases & Other Archives

IT & Telecom Infrastructure

Industries
Banking
Insurance
Government
Finance / Accounting
Transportation / Logistics
Healthcare
Use Cases
AP & Invoicing Processing
Digital Mailroom
Customer Onboarding
Constituent/Citizen Enrollment
Loan Processing
Insurance Claims Processing
Shipment Processing
Contracts and Records Processing
Patient Records

Cognitive Capture



File Import Profile: Default

Navigator

Document Type: Select a document type...

OnBoarding Process (1)

1: (1)

Fields

Document Folder Process

Name: Laura Wilson

Email: lauraw@gmail.com

Mobile: 9999-999878

POC: Credit Card

Document	Required
ID USA	<input checked="" type="checkbox"/>
Proof of Address	<input checked="" type="checkbox"/>

Page 1 of 1

The Gas Company
Semptra Energy usay®

ACCOUNT NUMBER 198 209 5568 0
SERVICE FOR
LAURA WILSON
9334 WISHIRE BLVD
BEVERLY HILLS CA 90212

DATE MAILED Jan 16, 2013 Page 1 of 2
24 Hour Service
1-800-427-2200 English
1-800-342-4545 Español
1-800-252-0259 TTY
www.socialgas.com

Account Summary

Amount of Last Bill		\$14.19
Payment Received	12/19/12 THANK YOU	- 14.19
Current Charges		+ 15.44
Total Amount Due		\$15.44

This bill reflects modified gas charges due to a rate change.

Current Charges

Rate: GR 4 - Residential Climate Zone: 1 Baseline Allowance: 44 Therms
Meter Number: 13252137 (Next scheduled read date Feb 13 2013) Cycle: 9

Billing Period	Days	Current Reading	Previous Reading	Difference	Billing Factor	Total Therms
12/11/12 - 01/14/13	34	0225	0214	11	1.018	11

GAS CHARGES

Customer Charge	34 Days x \$.16438	5.59
Gas Service (Details below)	11 Therms	

Therms used 11
Rate/Therm \$.72545
Charge \$ 7.98

DATE DUE Feb 6, 2013
AMOUNT DUE \$15.44

Gas Usage History (Total Therms used)

Month	Total Therms used
Jan 12	12
Feb 12	10
Mar 12	11
Apr 12	10
May 12	11
Jun 12	10
Jul 12	11
Aug 12	10
Sep 12	11
Oct 12	10
Nov 12	11
Dec 12	10
Jan 13	11

Total Therms used: 12, 10, 11
Daily average Therms: .3, .3, .3
Days in billing cycle: 36, 33, 34

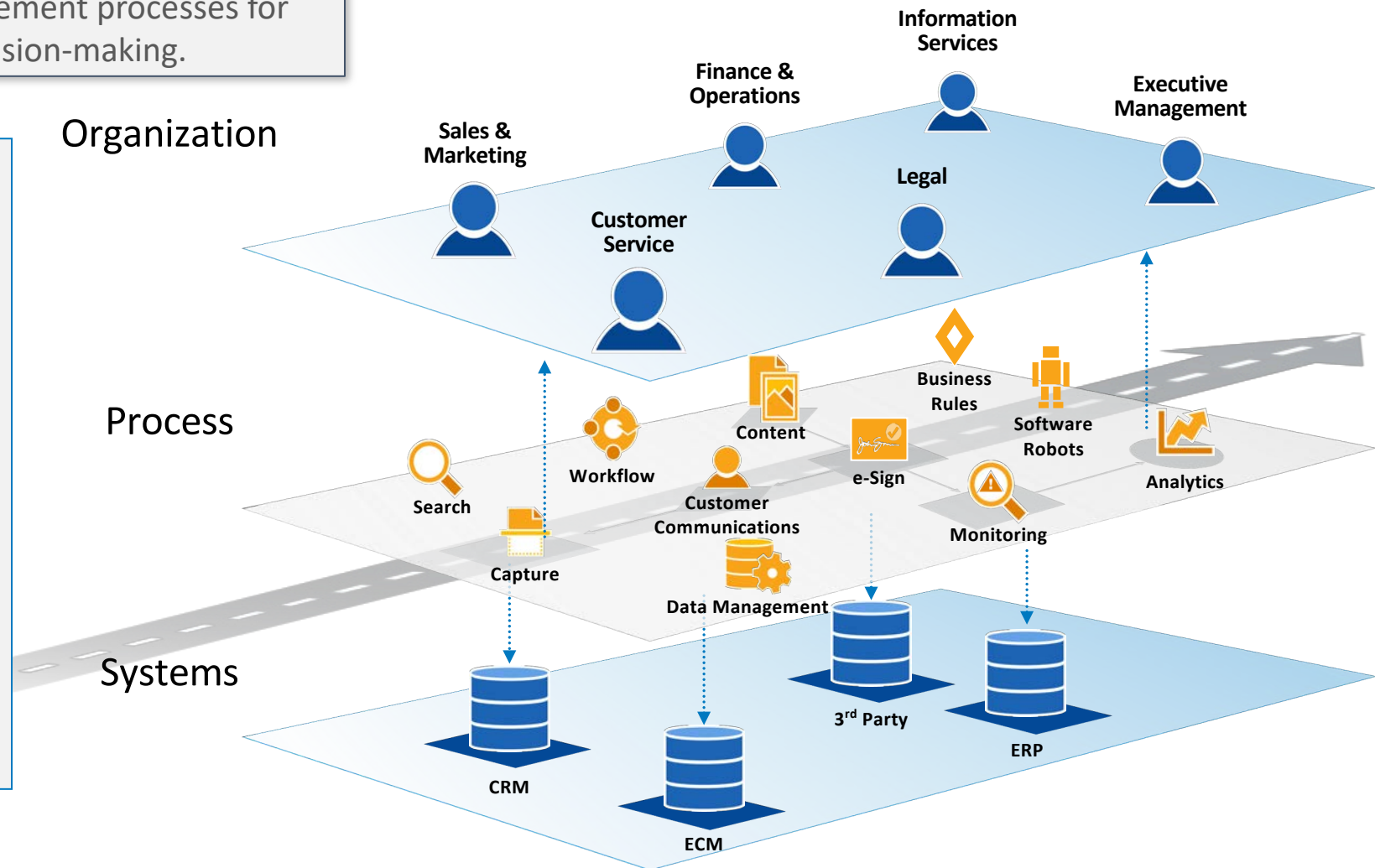
*****Special Discount***** You may be eligible for the California Alternate Rates for Energy (CARE) program. For more information or to apply online, go to socialgas.com (search "CARE"). Or call 1-800-427-2200 to request an application.

*****Descuento Especial***** Usted podría ser elegible para el programa de

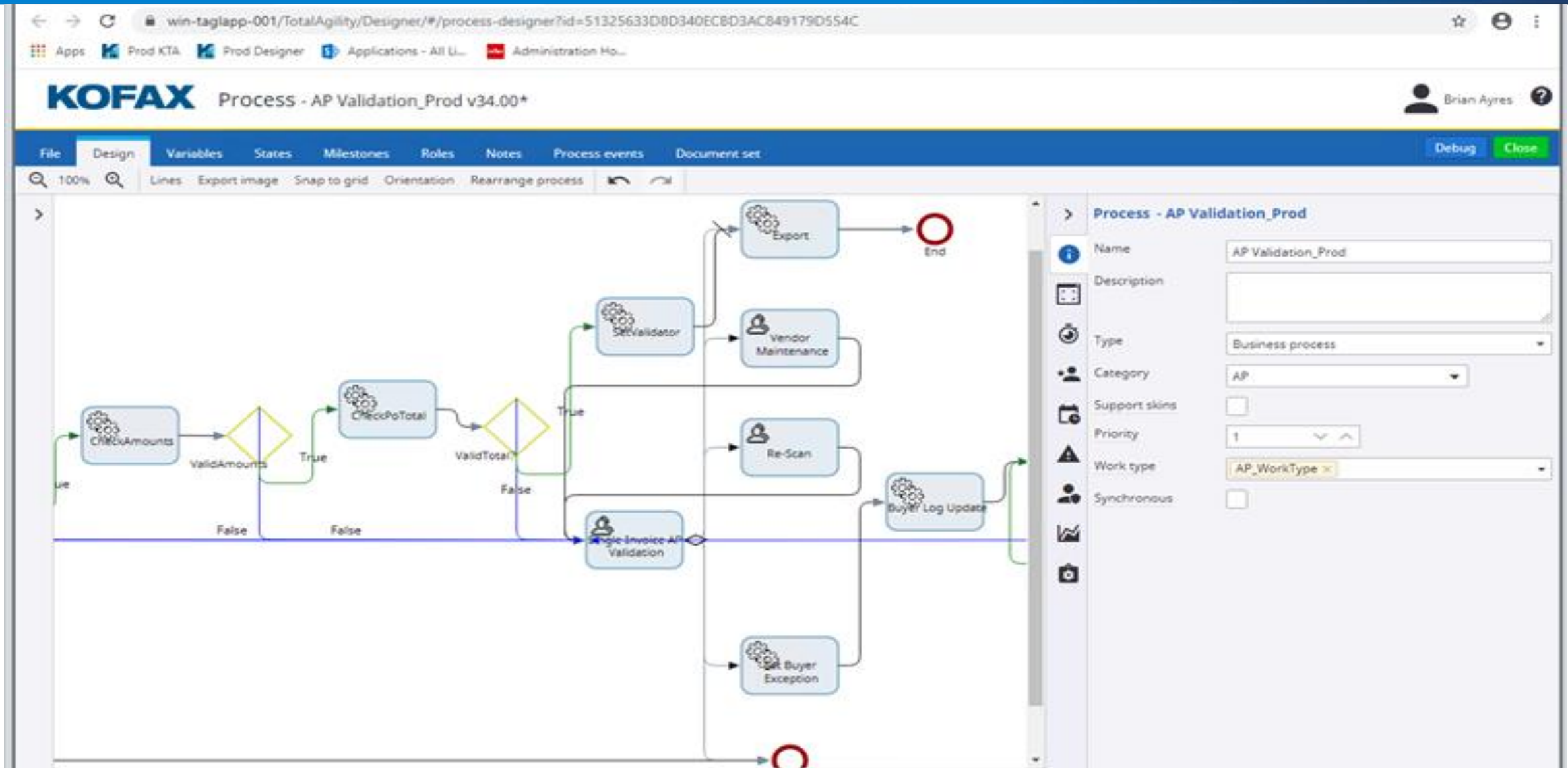
Process Orchestration

Automate routine workflow and case management processes for compliance, flexibility and better human decision-making.

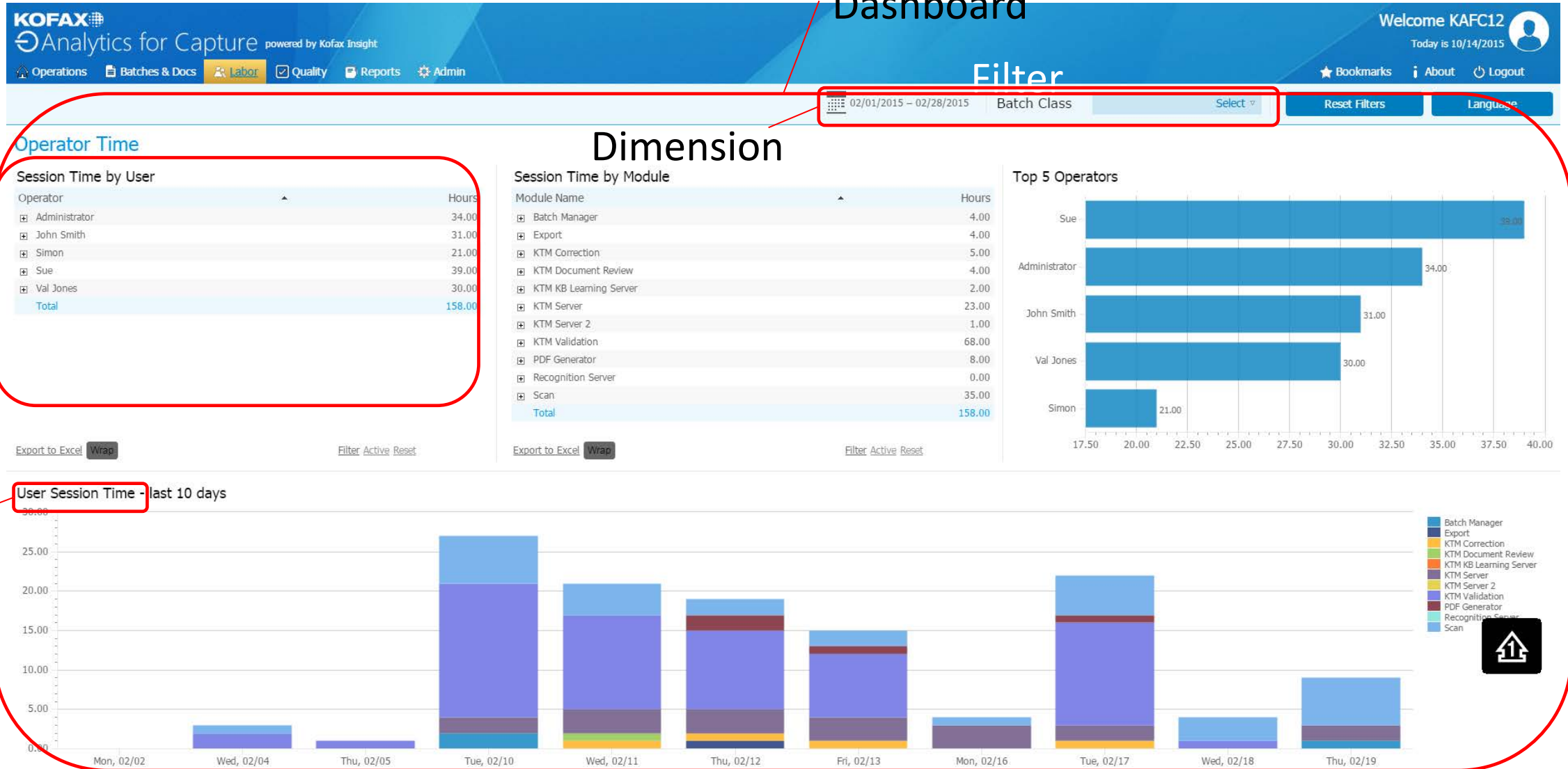
- Adds velocity, speed and direction
- Orchestrates people, organization and systems efficiently
- Delivers agile, dynamic, but well managed business processes
- Increases agility and responsiveness



Process Orchestration



Analytics – Sample Dashboard



View

metric

- + More Granular Security for Capture And Extraction process and Activities**
- + True BPM and Case Management in a single application alongside Capture**
- + Access to Intelligent Automation Platform**



Kofax TotalAgility 'Move-Up' Program

Kofax instituted the Move-Up program to offer its Capture and Transformation clients a roadmap to enhance their existing capture system with the benefits of true Case management and Business Process Automation.

Move Up Program Overview



Key Considerations:

Up to 70% off KTA licenses

Access Intelligent Automation Platform

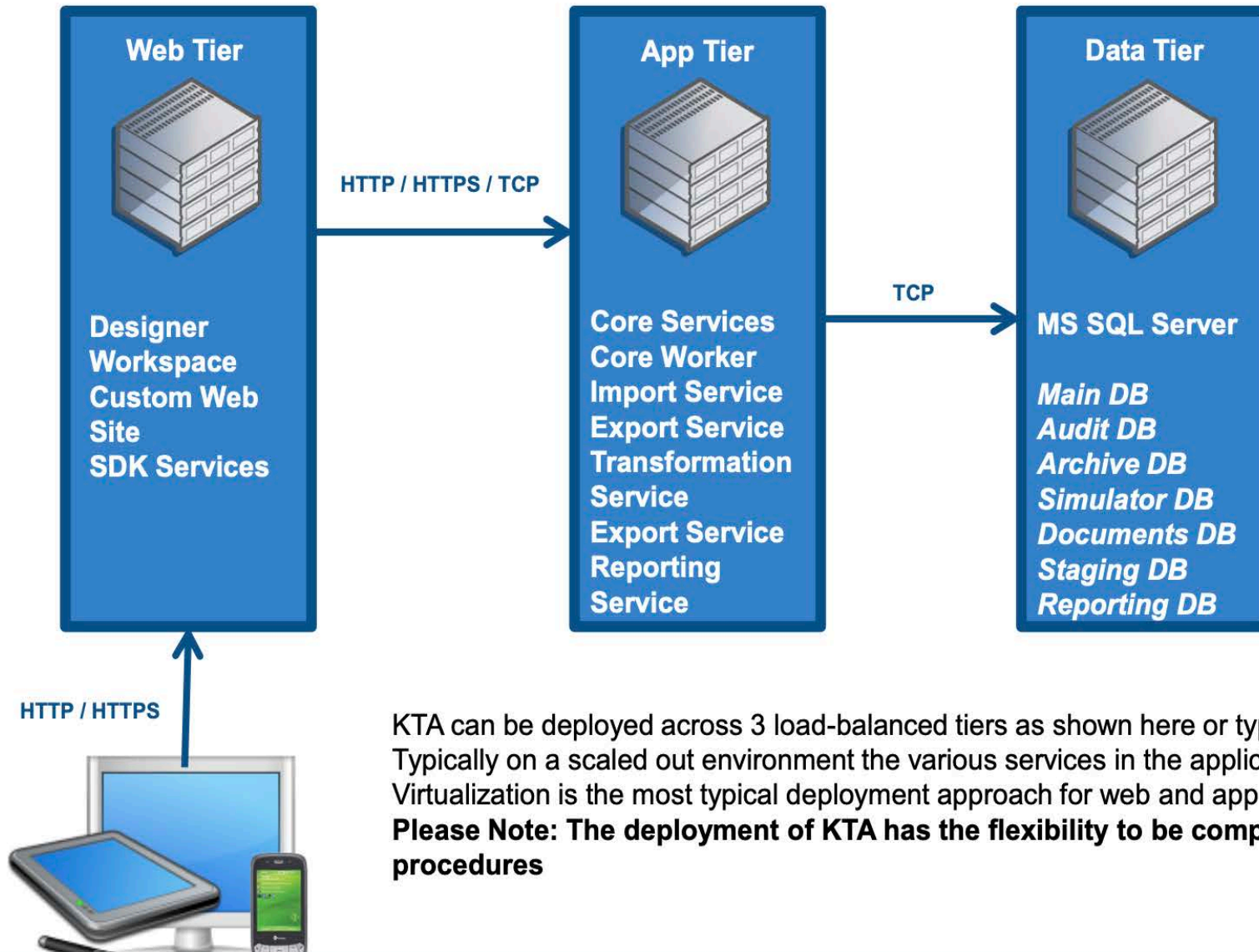
Trade in existing licenses

Use both products for 1 year (as you migrate)

- + **The program is available to customers who have current maintenance plans as of April 1, 2020 for any version of Kofax Capture, Kofax Transformation, Kofax eFlow, ReadSoft Documents, Forms, and Xbound**
 - Eligible systems purchased after April 1, 2020 do not qualify for this migration offer.
 - Add-on purchases after April 1, 2020 for an eligible system are eligible for this program
 - Reduction of the existing system are not permitted under this program
 - The whole system must be considered for migration. If only a partial system will be migrated to TotalAgility, the customer will first need to reconfigure their existing system
 - Customers with expired maintenance can reinstate their maintenance in accordance with reinstatement policies to become eligible for this program

A photograph of three business professionals in a modern office setting, overlaid with a blue gradient. The image shows a man in a white shirt and a woman in a white blouse and dark pants in the foreground, and a man in a dark blue shirt in the background. They appear to be in a conversation. The background features a staircase and a brick wall.

Migration Planning & Considerations



KTA can be deployed across 3 load-balanced tiers as shown here or typically the web and app tier can be combined. Typically on a scaled out environment the various services in the application tier can have dedicated servers. Virtualization is the most typical deployment approach for web and app tiers with a physical database server. **Please Note: The deployment of KTA has the flexibility to be compliant with any customers deployment procedures**

- + **Classification and Extraction sets map to new separate modules in KTA**
- + **Some documents may need to be re-trained**
- + **Some tweaks to the projects may need to be made**
- + **New automation features to consider**

+ Is Migration right for you?

SUMMARY, QUESTIONS, & ADDITIONAL RESOURCES

Kofax TotalAgility combines the functionality found across Capture and Transformation into a single platform. If you are a Kofax Capture or Transformation customer, you should consider migrating to TotalAgility rather than continuing to invest more resources into support, maintenance, and upgrades.

Thank you for attending #WebinarWednesday with RPI Consultants. This webinar has been recorded and will be available online shortly. If you have any further questions, please Contact Us at rpi@rpic.com.

- + Latest Information on Kofax Capture and Transformation**
- + Kofax TotalAgility Capabilities & Features**
- + Kofax TotalAgility 'Move-Up' Program**
- + Migration Considerations & Planning**

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+ **100+ Full-time Consultants**

- Including Project Managers & Architects

+ **Based in Baltimore, MD**

- Additional offices in Tampa, FL, and Kansas City, MO

+ **Technical & Professional Services**

- Technical Strategy & Architecture
- New Installations, Upgrades, & Migrations
- Process Analysis, System Design, Implementation
- Managed Services & Staff Augmentation
- Project & Change Management



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