rpi consultants

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

UPCOMING WEBINARS & OFFICE HOURS

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**
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+ **Microsoft Power Automate (Flow)**
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MEET YOUR PRESENTER

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

MEET YOUR PRESENTER

Alan Schefers

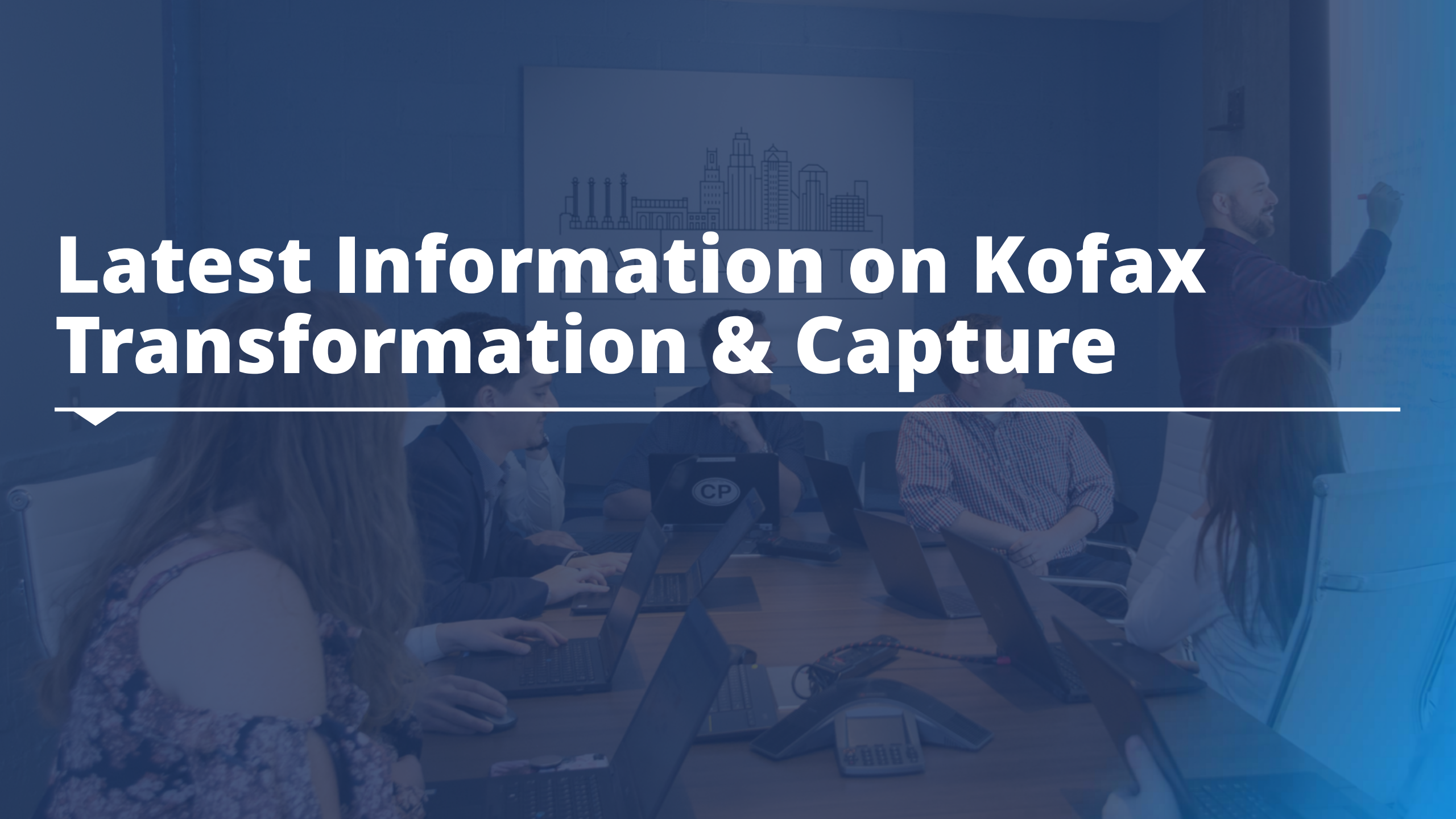
Senior Consultant

+ 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

AGENDA

+ 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 CAPABILITIES

- 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.

KOFAX CAPTURE FUTURE

- 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

TRANSFORMATION CAPABILITIES

- 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

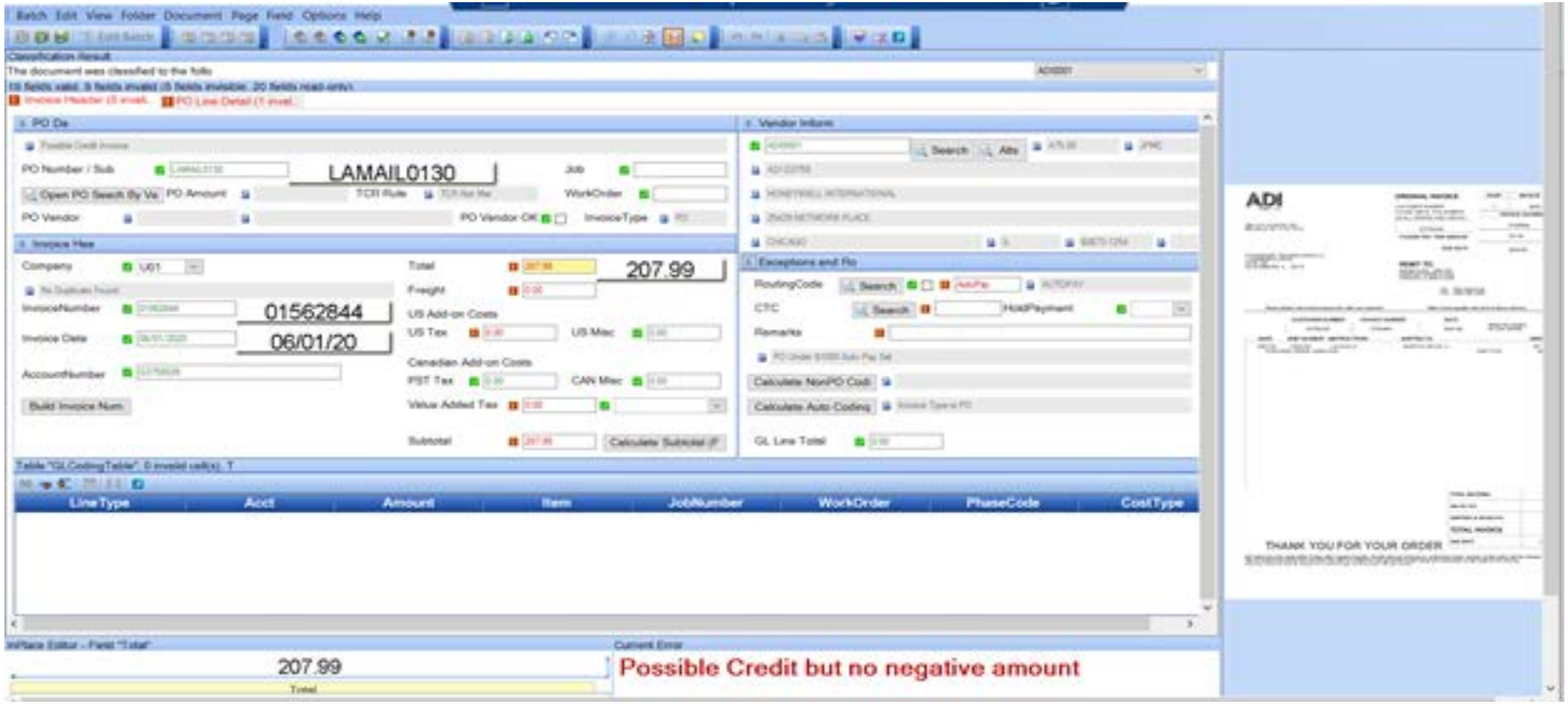
TRANSFORMATION FUTURE

- 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.

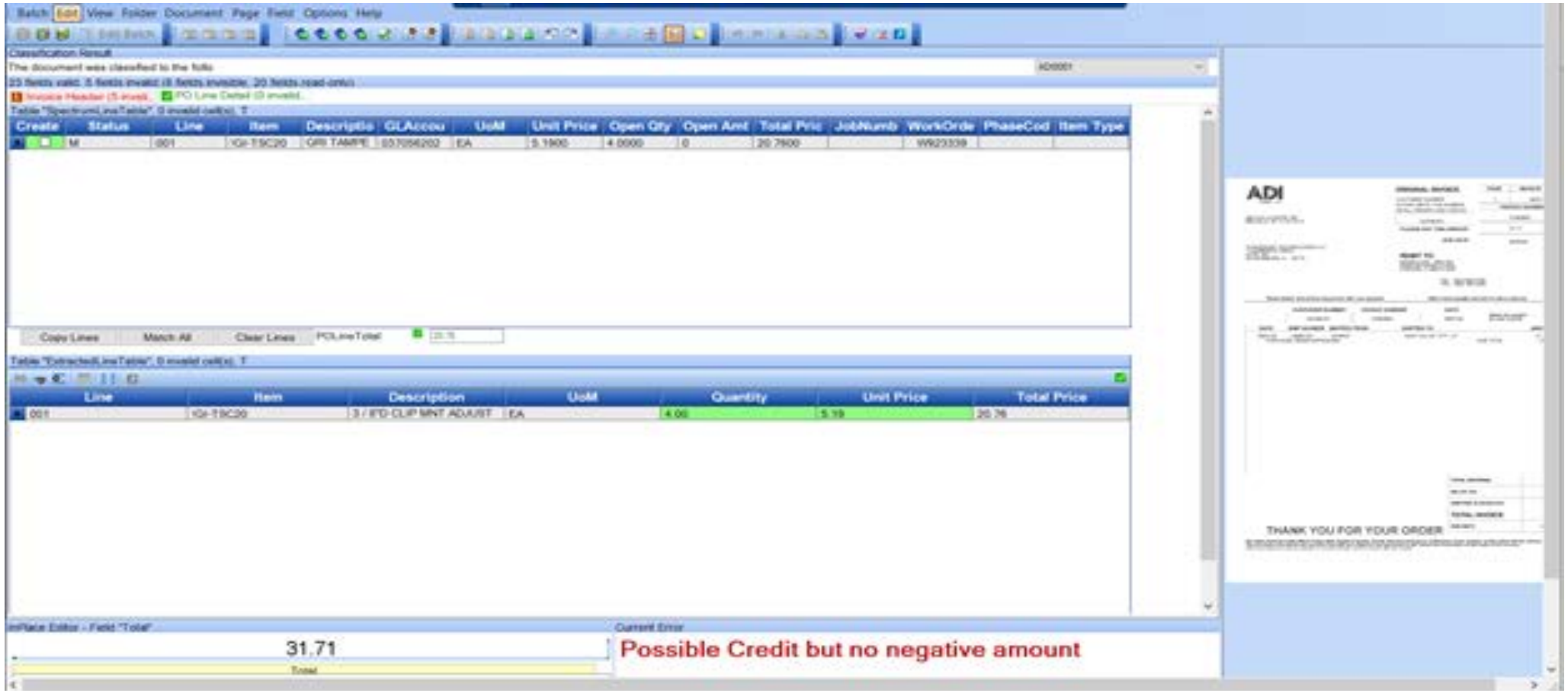
First Tab of KTM Validation Form is Invoice header Information



USE CASE: INVOICE PROCESSING

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

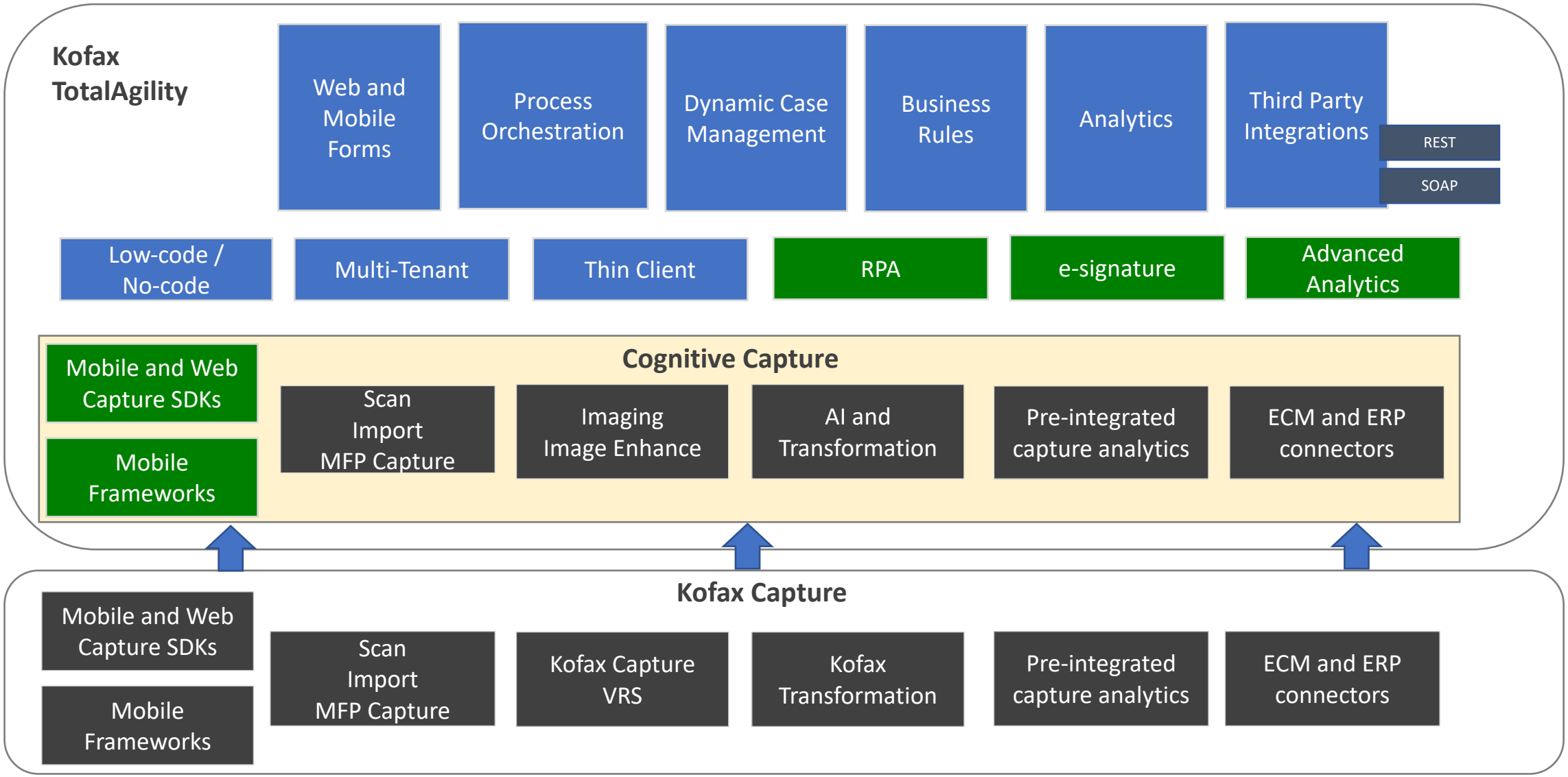
Second tab is Line Item information



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



* Sold separately. All other KTA components included.

KC/KT Similar Deck

KTA Beyond KC/KT Features

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

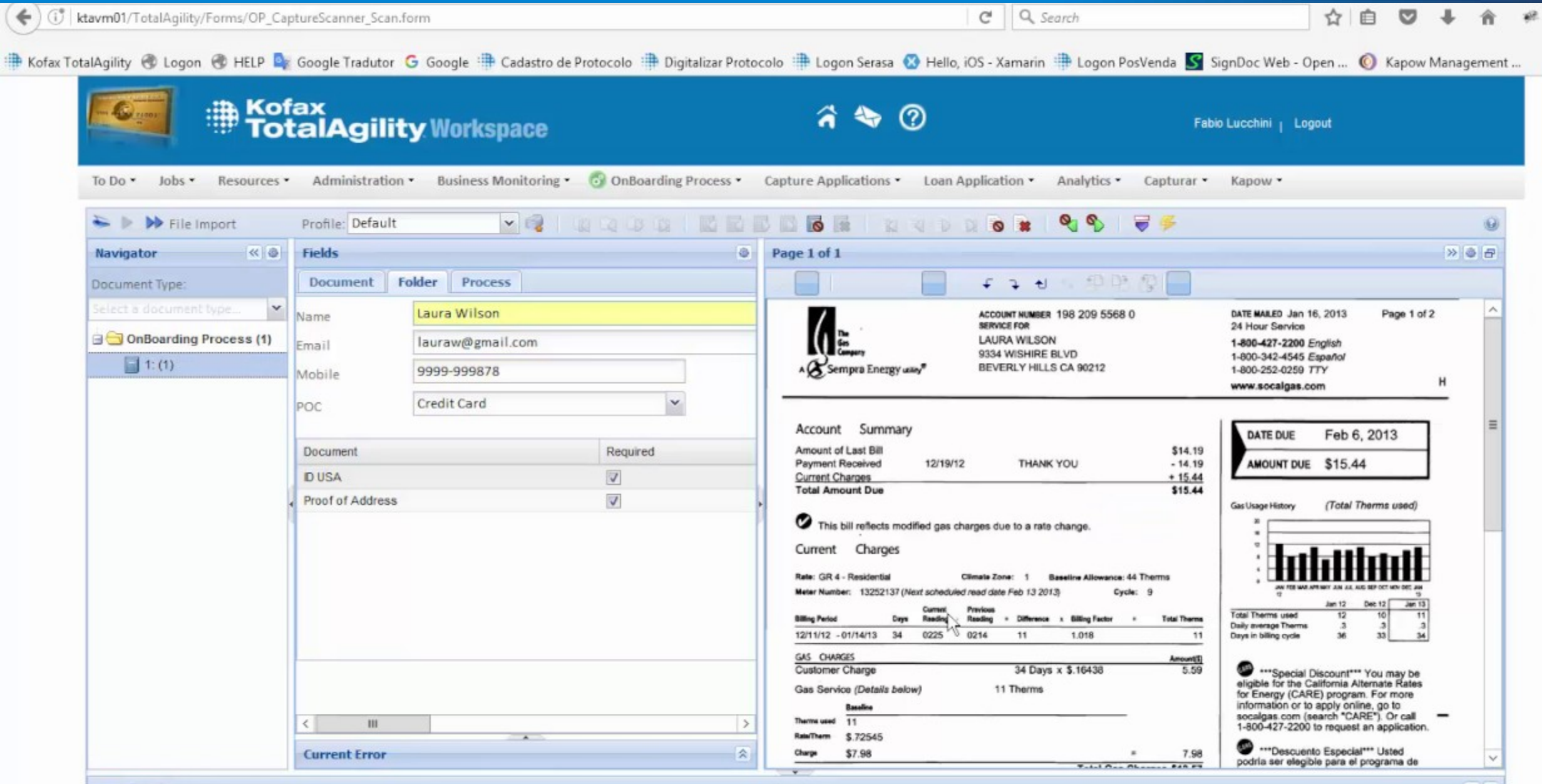
Integrate

- 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

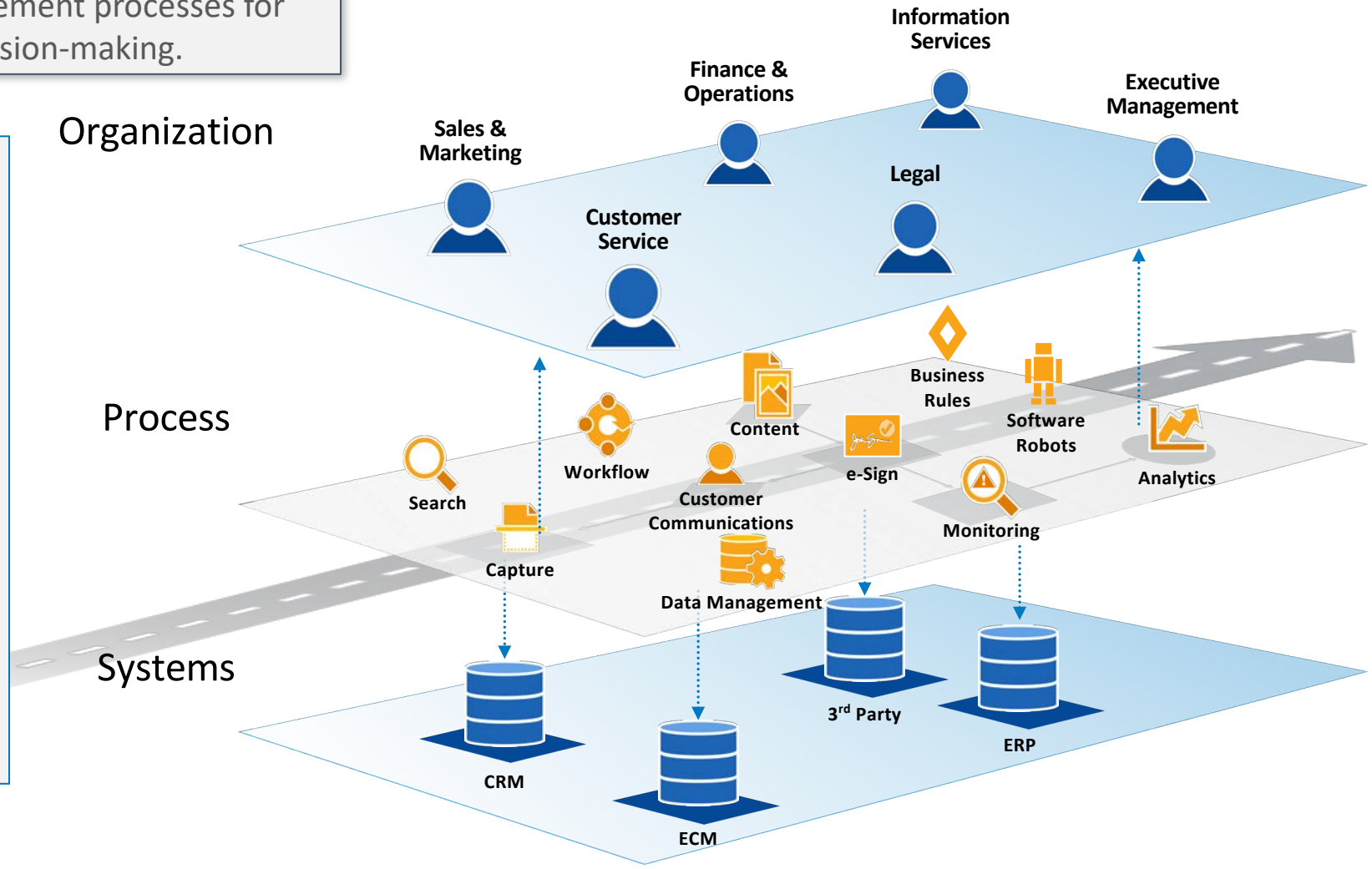
Cognitive Capture



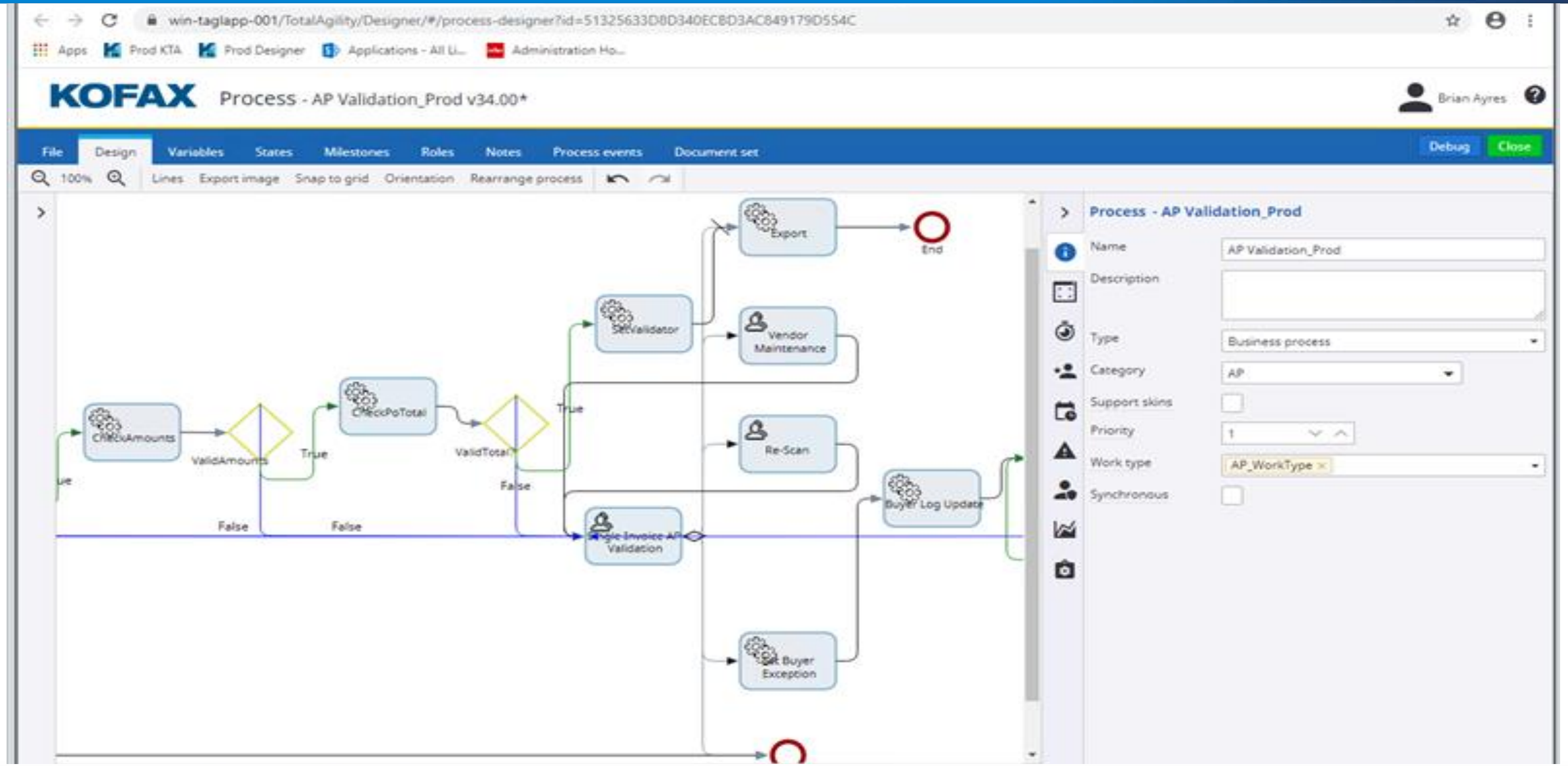
Process Orchestration

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

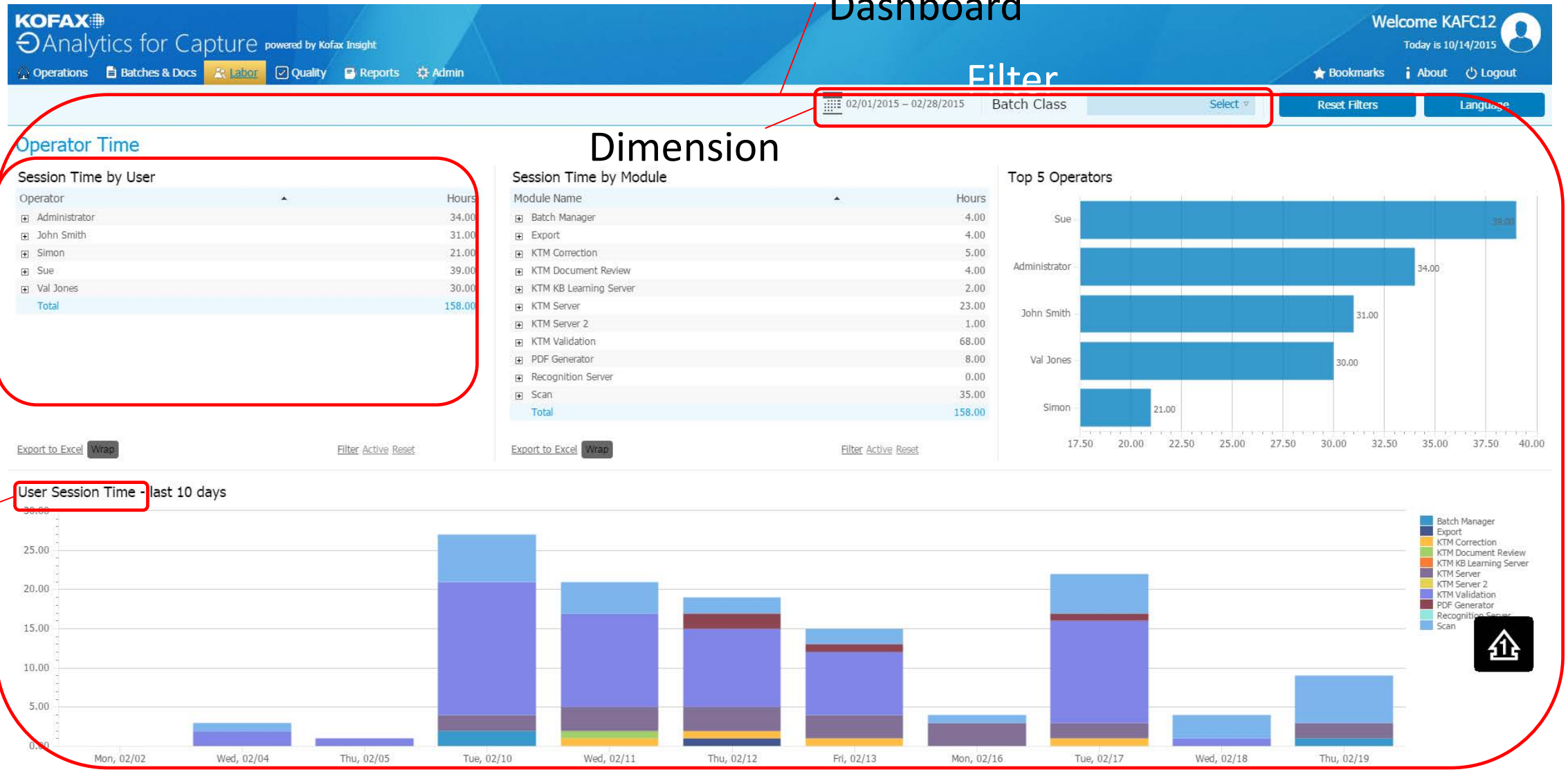
- Adds velocity, speed and direction
- Orchestrates people, organization and systems efficiently
- Delivers agile, dynamic, but well managed business processes
- Increases agility and responsiveness



Process Orchestration



Analytics – Sample Dashboard



ADDITIONAL BENEFITS

- 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:

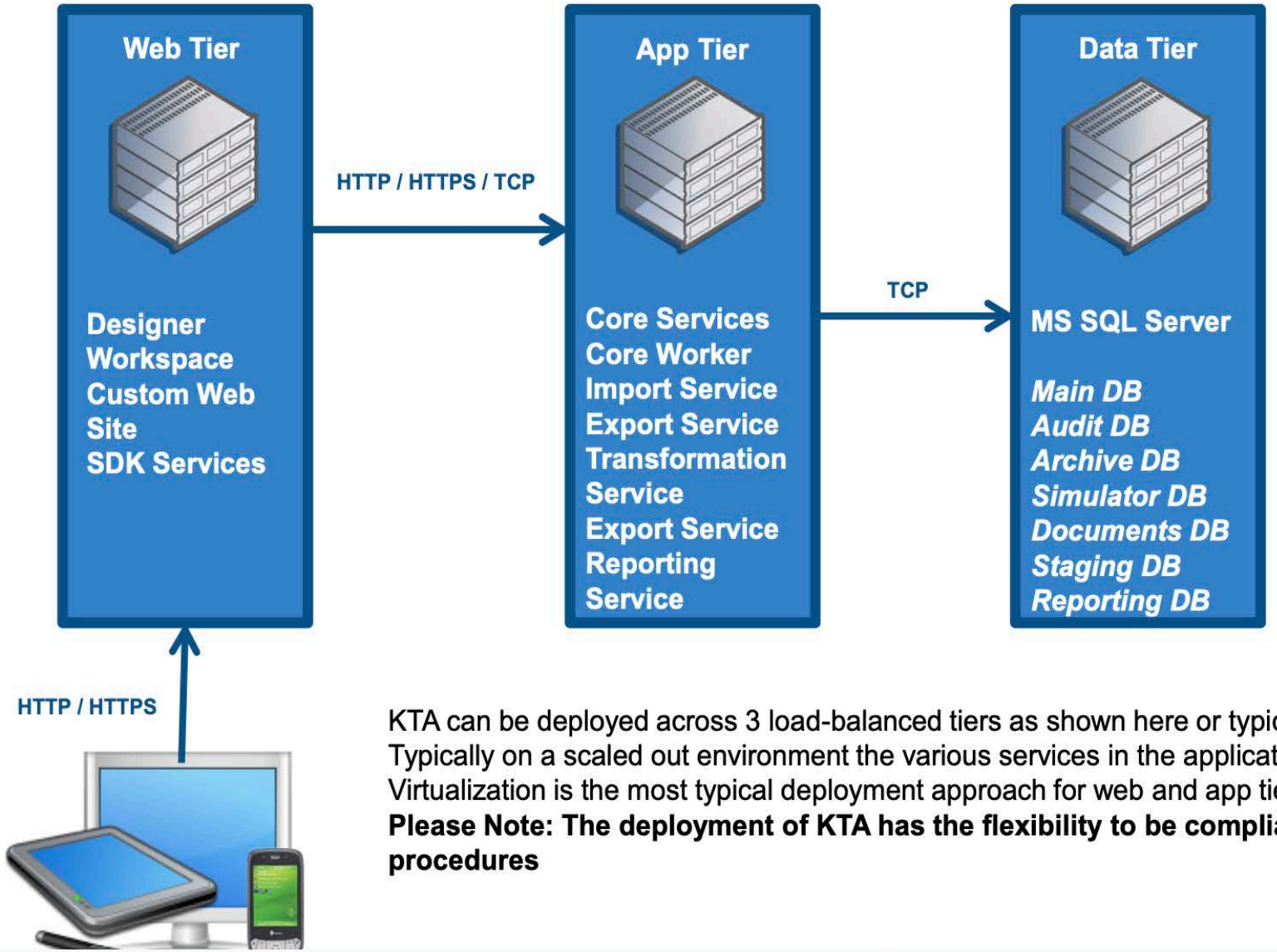
- Up to 70% off KTA licenses
- Trade in existing licenses
- Access Intelligent Automation Platform
- Use both products for 1 year (as you migrate)

TIMING & ELIGIBILITY

+ **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

Migration Planning & Considerations

Environment



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

KC and KT Project Migration

- 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

Migration Assessment

+ **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.

SUMMARY

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**

ADDITIONAL RESOURCES

+ **Upcoming & Previously Recorded Webinars**
  - www.rpic.com/webinars
+ **Product & Solution Knowledge-base**
  - www.rpic.com/kb
+ **Kofax Services & Solutions**
  - www.rpic.com/kofax

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ABOUT RPI CONSULTANTS

+ **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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