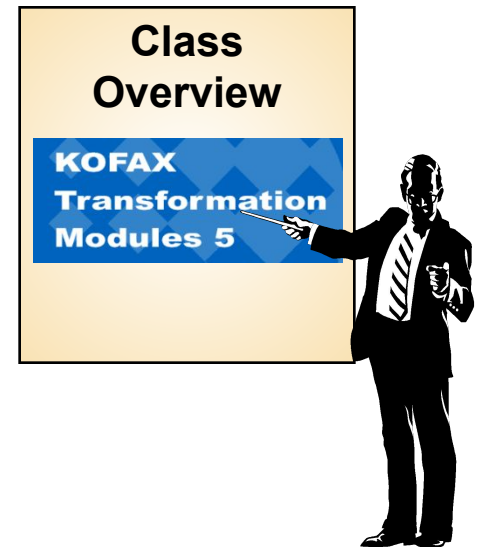# KOFAX Transformation Modules 5

Introduction to Class Training

WELCOME!

KOFAX

Invoice Class Training Overview

- Duration

- Prerequisites

- Class Materials

- Goals

- Class Structure and Methodology

- Module Overview

Class Overview

KOFAX Transformation Modules 5

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Duration and Schedule

- Four and one-half days
  - 8:30-10:30   Class
  - 10:30-10:45   Break
  - 10:45-12:00   Class
  - 12:00-1:00   Lunch
  - 1:00-2:00   Class
  - 2:00-2:10   Break
  - 2:10-3:15   Class
  - 3:15-3:25   Break
  - 3:25-4:30   Class

- Friday is a long half-day – class over no later than 2:30
- Covers Kofax Transformation Modules (KTM) 5 for Invoices

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Prerequisites

- To get the most out of this class, you should have…

  - Basic working knowledge of Kofax Capture encompassing creation of Batch Classes and processing batches from Scan through Release

  - Navigational skills within Windows

  - Programming experience may be helpful, but is certainly not required

CBT – Two Delivery Methods

- CBT, software and resources are downloaded from Kofax's e-fulfillment site
  - You must have registered with a valid serial number you obtained at time of purchase.
  - Download the software, the license key and product code.
  - Make sure your machine meets the software prerequisites covered in Module 3, including having Kofax Capture installed and licensed.
  - Print out the student notebook (note guides) including labs.
  - Install KTM using the instructions in Lab 3 to complete the labs.
- Streamed via Kofax's On-demand server
  - No download required. No pre-installation requirements to meet. Instead, you will connect and log on to a remote machine to which you've been given special access, using the credentials we've provided you via email.
  - You will install the software from a virtual DVD drive that already exists on the remote computer.
  - The machine will be assigned to you for a period of two weeks beginning with the date specified on the email. If you need an extension, please send your request to training@kofax.com. Extensions will be considered and granted based on availability.
  - We recommend printing out student note guides and lab instructions as needed.

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Materials

- Materials
  - A Student Guide
  - A Lab Guide
  - Copies of all instructor slides
- KTM Software
  - KTM 5
  - Documentation (electronic format)
- Resources (on USB flash drive)
  - Required files and resources for lab exercises
- Additional Handouts
  - As required

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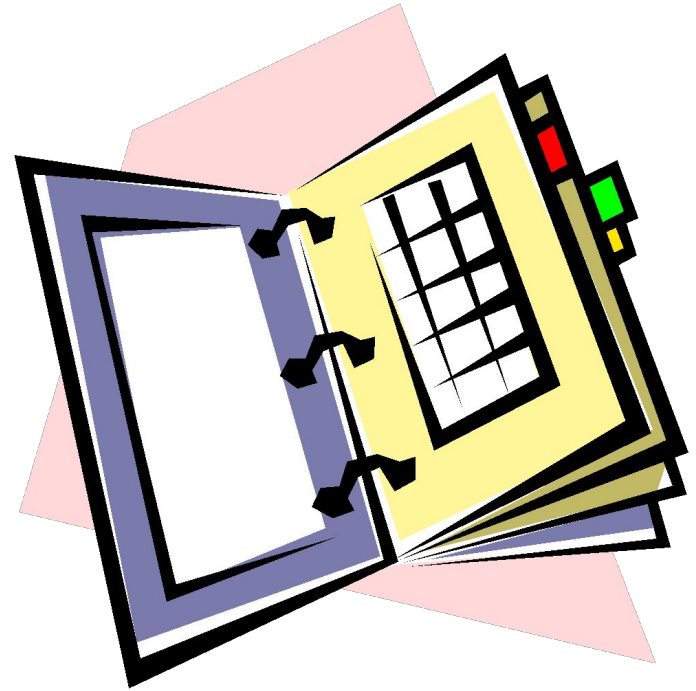
Class Structure and Methodology

- Building-block Approach to Learning
  - Start with the simple and build upon it with more complex concepts and tasks

- Illustrated Lecture
  - Via Microsoft PowerPoint presentations

- Live Demonstrations
  - Instructor will demonstrate setup, processing and results

- Hands-on Lab Exercises
  - Attendees will practice what they have learned

- Measurement of Results
  - Results of the lab exercises (measures performance)
  - Certification Examination (measures knowledge)

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Goals

- By the end of training, you will be able to:

  - Describe the capabilities of Kofax Transformation Modules

  - Describe the differences between an "invoice" project and a "standard" project.

  - Install and configure KTM in both a client/server and standalone configuration.

  - Correctly set up multiple projects to classify and separate documents using

    - Kofax Capture scantime Separation

    - KTM for Layout, Content and Instruction Classification

    - Project Planner for Trainable Document Separation

  - Demonstrate methods of extracting data by setting up and using:

    - Generic and Specific Knowledge Bases

    - Various types of Locators and Evaluators

    - Fields

      Formatters

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Goals (cont.)

- Successfully set up and configure the KTM Thin Client Server for Validation, Verification and Correction

- Integrate KTM with Kofax Capture

- Successfully set up, configure and process a variety of batches, simple through complex, for both invoices and other more generic applications

- Pass a certification examination with a score of 80% or higher.

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Modules

- Module 1   Class Introduction

- Module 2   KTM Product Overview

- Module 3   Installing KTM

- Module 4   Project Builder & Introduction to Classification Methods: Layout Classification

- Module 5   Extraction Overview

- Module 6   Invoice Projects and Automatic Extraction

- Module 7   Validation & Verification

- Module 8   Adding Extraction Methods

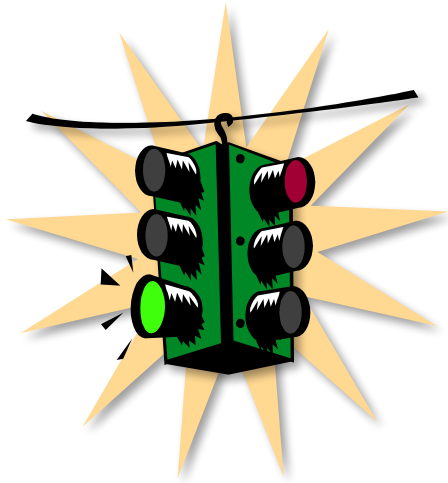- Module 9   Remote Thin Client Validation, Verification and Correction

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Modules (cont.)

- Module 10   Classifying by Content – The Adaptive Feature Classifier

- Module 11   Classifying by Matching Words or Phrases; Class Hierarchies & Properties; Using Multiple Classification Methods

- Module 12   Project Planner; Page-level Classification; Trainable Document Separation

- Module 13   Document Review; Adding Extraction to a TDS Configuration

- Module 14   Extracting Line Item Detail; Table Locators and Table Fields

- Module 15   Database Locators & Lookups

- Module 16   Fixed Form Processing – Advanced Zone Locators, Bar Code Locators, A2iA Zone Locators; Character-based Correction

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Modules (cont.)

- Module 17   Classification Locators & Automatic Foldering

- Module 18   Document Routing and Workflow

- Module 19   Review

- Module 20   Testing & Certification

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Are you ready???

Let's Go!

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Modules 5

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