

KOFAX

Transformation

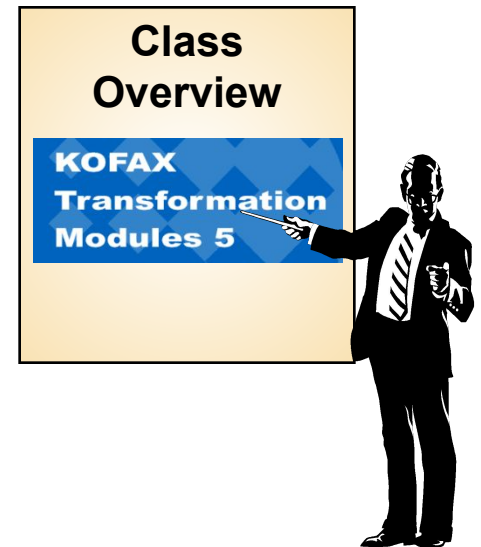
Modules 5

Introduction to Class Training

WELCOME!

Invoice Class Training Overview

- Duration
- Prerequisites
- Class Materials
- Goals
- Class Structure and Methodology
- Module Overview



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

Prerequisites

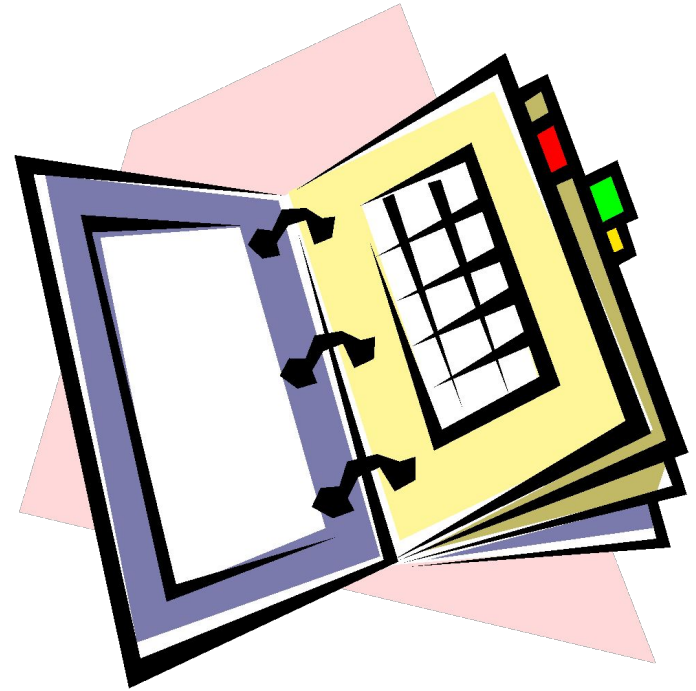
- To get the most out of this class, you should have...
 - Basic working knowledge of Kofax Capture encompassing creation of Batch Classes and processing batches from Scan through Release
 - Navigational skills within Windows
 - Programming experience may be helpful, but is certainly not required



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.

- 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



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)

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

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.

- 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

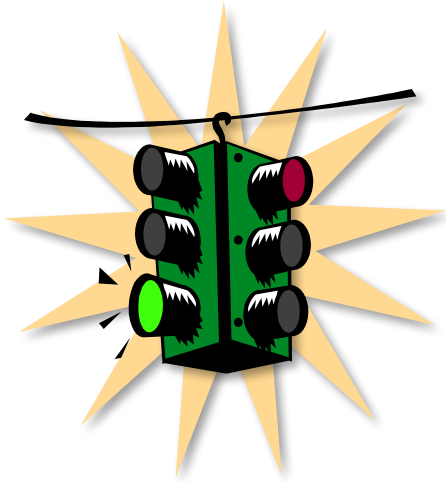
Modules (cont.)

- 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

Modules (cont.)

- Module 17 Classification Locators & Automatic Foldering
- Module 18 Document Routing and Workflow
- Module 19 Review
- Module 20 Testing & Certification





KOFAX Transformation Modules 5