Module 12 – Extending Kofax Capture

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Extending Kofax Capture
- Kofax Capture Network Server (KCNS)
- Kofax Capture Import Connectors – XML, Email, Web Services
- Kofax Import Connector (KIC)
- Kofax Front Office Server (KFS)
- Kofax Transformation Modules (KTM)
- Kofax TotalAgility
- Kofax Mobile Capture
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- Kofax Web Capture
- Kofax Communication Server
- MarkView for Accounts Payable
- Kofax Monitor
- Kofax Analytics for Capture

What are Extensions?
- Extensions represent options for capturing and processing documents with Kofax Capture.
- The following extensions are included with Kofax Capture at no additional charge (standard licensing still applies however):
  - Kofax Capture Network Server (KCNS)
  - Kofax Capture Import Connector – XML
  - Kofax Capture Import Connector – Email
  - Kofax Capture Import Connector – Web Services

Note: The import connectors listed here are being deprecated and replaced by the Kofax Import Connector discussed later in this module.
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Kofax Capture Network Server (KCNS)

- A remote capture system made up of one or more web server modules, one or more self-starting services, one or more file cache locations and one or more remote client installations.
- KCNS is included and seamlessly integrates with Kofax Capture.
- Allows cost-effective deployment of remote scan stations, workstations, and capture networks using the Internet, an intranet or any TCP/IP connection.
- “Distributed scanning” offers unlimited scalability of the capture network.

KCNS Deployment

KCNS Installation Steps

The following is an overview of the steps for installing KCNS:

1. Install Kofax Capture at the central site.
2. Enable the Kofax Capture Network Service (KCN Service) at the central site.
3. Install the Web server (IIS or WebSphere) at the central site.
4. Install the KCN Web server components at the central site.
5. Install Kofax Capture at the remote sites.
6. Convert Kofax Capture remote installations to remote sites (slaves to the master at the central site).
Using KCNS in Production

- Kofax Capture scan stations, work stations and capture networks can be installed at one or more remote locations.
- Remote client installations may use the Kofax Capture Batch Manager to connect to a central KCNS Server to send and receive batches and receive published batch classes (this is called synchronization).
- Clients scan/import documents, then use the Remote Synchronization Agent (RSA) to communicate with the central site.
- Any and all activities which are part of the Kofax Capture workflow can occur at any remote or the central site – including remote site export.

Kofax Capture Import Connectors – Included

- Three import connectors are included for no charge as part of Kofax Capture (however standard Kofax Capture licensing applies):
  - Kofax Capture Import Connector – XML is an application that imports electronic images and index data to create batches by reading batch information from special-purpose XML files.
  - Kofax Capture Import Connector – Email is an application that allows the automatic import of email and email attachments into Kofax Capture.
  - Kofax Capture Import Connector – Web Services is an application that allows automatic import of messages and attachments via Web service calls.

Note: The import connectors listed here are being deprecated and replaced by the Kofax Import Connector discussed later in this module.
Kofax Import Connector

- **Kofax Import Connector** (KIC) is designed to import electronic documents, convert them into Kofax Capture-compatible format and then forward them to Kofax Capture for further processing.
- Kofax Import Connector can import messages and files from multiple electronic formats:
  - Email messages and attachments using various email protocols (SMTP, POP3, IMAP).
  - Fax messages via fax over IP (FoIP) or external fax servers.
  - Electronic documents from local or network watched folders.
  - Electronic documents via web services.

Kofax Import Connector Features and Benefits

- Receives faxes via FoIP
- Receives emails via SMTP, IMAP, or POP3
- Converts and normalizes MS Office, HTML, PDF, image and text into TIF or PDF
- Mapping messages and attachments directly to Kofax Capture batches
- Support of loose pages and foldering
- Mapping of message fields to Kofax Capture fields
- Availability of VRS to optimize document attachments

Kofax Import Connector Components

- **Message Connector**
  - Receives and converts messages
  - Functions as a message storage location

- **KC Plug-In**
  - Imports electronic messages and attachments into Kofax Capture
**Kofax Front Office Server**

- **Kofax Front Office Server (KFS)** is a plug-in for Kofax Capture that enables documents from a variety of sources, including multifunction peripherals (MFPs), to be delivered to a Web client for processing or directly to Kofax Capture.
- KFS extends Kofax Capture to the front office.
- Through a single, enterprise-class server, KFS can capture documents regardless of their original format, allow users to interact with documents through flexible thin client options, and route documents to Kofax Capture for further document processing.

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**KFS Deployment**

**KFS Architecture**
Direct Integration with Kofax Capture

- KFS is obtained and installed as a separate component to Kofax Capture.
- Kofax Capture serves as the back-end destination for KFS documents and both are tightly integrated.
- KFS supports the same infrastructure platforms as Kofax Capture, sharing the following resources:
  - Operating systems
  - Shared database server
  - Shared server files folder
  - Web server
  - VMWare server platforms
  - Cluster server support

Kofax Transformation Modules

- **Kofax Transformation Modules** (KTM) offers superior separation, form ID, and extraction for semi-structured and unstructured documents and data.
- A series of custom modules ideally suited for processing invoices and other semi-structured and unstructured documents.
- Fits seamlessly into a Kofax Capture solution.
- A separate add-on and licensed product for use with Kofax Capture.

Document Types

- Kofax Capture is well suited to process **structured** documents.
- With custom modules and Kofax Capture add-on components such as KTM, semi-structured and unstructured document types can now be processed more efficiently.
Semi-Structured Documents

- Some content may vary
- Tables, for example, have column positions fixed, but number of rows may vary (an invoice is an example of semi-structured documents)

Unstructured Documents

- Free-form documents
- Content and structure vary greatly

KTM Comprises Multiple Modules

KTM comprises multiple modules used for learning, separation, classification, extraction, validation, and verification.
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Kofax Capture Batch Workflow with KTM

KOFAX

KTM becomes part of the Kofax Capture workflow

Kofax TotalAgility

**Kofax TotalAgility** makes all business process management lifecycle functionality accessible.

- Provides a central tool for managing processes and forms by focusing on:
  - **Process Execution** to ensure delivery of the right work to the right person at the right time.
  - **Process Monitoring** to support human decision making.
  - **Process Optimization** to let users quickly adapt to changing circumstances.

KOFAX

Define and Execute the Process

- Business rules (developed in the process design activity) can be used to provide definitions for governing behavior.
- Kofax TotalAgility has been developed to then enable the full business process to be directly executed by the computer.
- The system will either use services in connected applications to perform business operations (such as calculating a repayment plan for a loan) or, when a step is too complex to automate, will allow for human (knowledge worker) interaction.
### Kofax Mobile Capture

**Kofax Mobile Capture** extends business processes and transactions by enabling field representatives or customers themselves to capture documents, photos and audio and video files using a smart phone or tablet to initiate critical business processes at the point of origin.

- Captured documents and data are then sent to back office servers for further processing.

### Kofax Mobile Capture Benefits

**Benefits include:**

- Accelerates processes.
- Minimizes latency.
- Speeds transactions.
- Reduces processing costs.
- Enables better service.

- A software developers kit (SDK) is also available for developing branded mobile applications based on the Kofax Mobile Platform.

### Kofax e-Transactions

**Kofax e-Transactions** reduces costs and errors in document receipt and entry by using electronic delivery

- For large and medium enterprises.
- Automates the electronic delivery and entry of documents from sender to receiver via secure email.
- Simple yet highly effective and scalable.

**Benefits include:**

- Eliminates the need for printing, mailing, scanning and entry of documents.
- Avoids the cost & complexity of older methods.
- Low cost, rapid payback.
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Kofax Web Capture

• **Kofax Web Capture** is a comprehensive **toolkit** for creating powerful web-based imaging applications. With this toolkit, you can create applications for:
  • Converting and normalizing images
  • Rotation
  • Annotation
  • Redaction
  • Image cleanup
  • Advanced OCR operations
• .Net-based library (C# or VB.NET)

Kofax Communication Server

• **Kofax Communication Server** replaces manual, slow, error prone and expensive processes for transmitting large volumes of documents.
  • For large and medium enterprises.
  • Seamless integration of any media with enterprise applications (SAP, IBM WebSphere MQ) and Kofax Capture.
  • High volume capabilities support global enterprise deployment.
  • Robust and reliable architecture ensures business communication continuity.

MarkView for Accounts Payable

• **MarkView for Accounts Payable** is an end-to-end accounts payable automation application for high volumes of invoices
  • For large and medium enterprises.
  • Leading capture and intelligent document recognition.
  • Best practice, configurable workflows.
  • Most complete solution.
• Benefits include:
  • Reduces AP costs and errors.
  • Increases visibility and speed to process.
  • Strengthens internal controls.
  • Optimizes cash management.
**Kofax Monitor**

- **Kofax Monitor** is a graphical application monitoring solution for tracking and reporting the health of business-critical systems to:
  - Continuously observe the applications and processes running in a capture environment.
  - Rapidly identify application problems and exceptions.
  - Deploy the proper resources to resolve problems.
- Uses monitors with resources to test conditions of:
  - Database connections
  - Server performance
  - Availability of services
  - Process times and queue performance

**Kofax Monitor Functionality**

- Uses monitors to test the Kofax Capture environment to:
  - Manage the uptime / availability of the Capture System.
  - Understand the document processing levels.
  - Allow the collection of Capture metrics.
  - Report on the condition of processes and services.
  - Create reports that provide performance analysis.
  - Alert managers and responders to critical conditions.
  - Allow problems to be resolved quickly.
  - Allow collection of Service Level Agreement (SLA) metrics.

**Kofax Monitor Runs in a Distributed Environment**

- The Distributed Server option feature allows the Kofax Monitor Server to be operating at multiple geographic locations.
- Monitors may be running the same set or different sets of monitors at each location.
- Results are sent over encrypted web services connections.
- Alerts can be sent to one or more Kofax Monitor Master Servers.
- Regional call centers, remote operations centers and distributed capture facilities are good candidates for the Kofax Monitor Distributed Server option.
K!fax Analytics for Capture

- K!fax Analytics for Capture provides near real time and historical reporting via preconfigured dashboards requiring no programming.

Demonstration

KCIC – XML and K!fax Front Office Server

Lab

- KCIC – XML and K!fax Front Office Server

Refer to the K!fax Capture 10 Lab and Reference Guide