

# Kofax Transformation Modules

Kofax Transformation Modules streamlines the transformation of different document types into structured electronic information, ready for delivery into business systems and processes.

## Do More with Less

Kofax Transformation Modules™ is an add-on to Kofax Capture that streamlines the transformation of different document types into structured electronic information, ready for delivery into business systems and processes. By replacing manual, error-prone and expensive document sorting and data entry processes with automatic document classification, separation and data extraction, Kofax Transformation Modules allows you to:

- **Speed processes** — Capture documents and information from those documents more quickly, accelerating business processes for faster cycle times.
- **Maximize productivity and reduce operating costs** — Drastically reduce the manual labor required to classify, separate, and enter data from high volumes of documents, and make your existing processors more efficient.

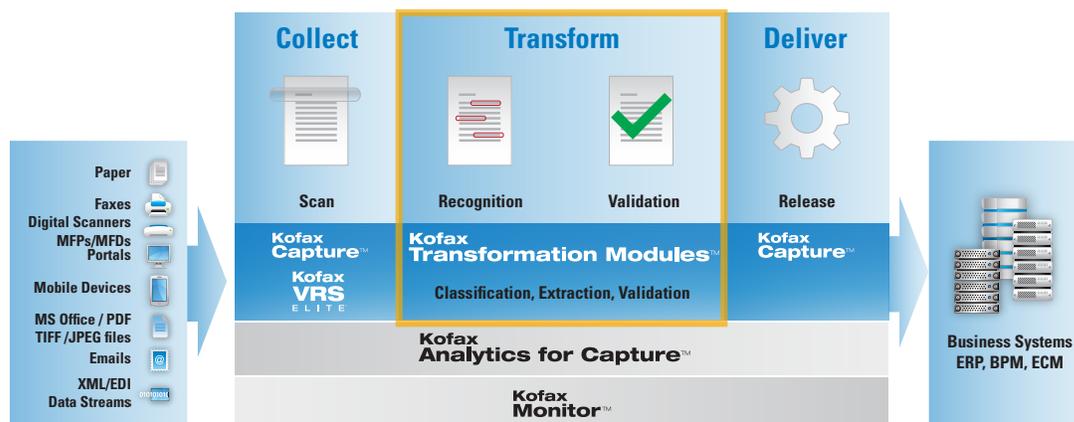
- **Increase information quality** – Increase information quality and reduce the number of costly errors and downstream processing exceptions.
- **Provide visibility of documents and data** — Store documents electronically along with comprehensive index information that allows you to search and retrieve them efficiently.
- **Ensure compliance** – With a clear audit trail, ensure adherence to business policies and regulatory requirements

For your business this means more accurate and faster decisions, more responsive customer service, greater profitability and reduced risk of compliance failure.

## Unmatched Power for Automating Document Intensive Processes Across the Enterprise

Kofax Transformation Modules features advanced capture technologies that can classify, separate and extract any document, regardless of type, content or format, so customers can leverage a single solution for all documents and business processes across the enterprise, including:

- **Invoice processing** — Extract and validate header, amount and line item data from supplier invoices and match to vendor and PO data in ERP systems to cut manual data entry costs and reduce processing exceptions.
- **Mortgage processing** – classify and extract hundreds of document types used in the mortgage process – application, underwriting, closing, and post-closing.



*Kofax Transformation Modules forms the heart of the capture process*

- **Medical claims processing** — Automatically extract data from U.S. CMS-1500, UB-04 and other claim forms to increase claims throughput and auto-adjudication rates.
- **Customer/employee onboarding** – Classify and extract pertinent information from new account applications, driver's licenses and other forms of identification, enrollment forms, etc.
- **Sales order processing** — Extract order data from scanned and faxed POs and validate against catalog databases, reducing the order-to-cash cycle.
- **Mailroom functions** — Classify all incoming mail as it enters the organization so it can be routed via workflow to departments and individuals, eliminating manual document sorting.
- **Legal discovery** - Discover and identify previously unknown documents from fileshares, including text-rich documents, for subsequent data extraction.
- **Forms processing** — Classify multiple form types (applications, claims, taxes, census) and revisions and extract handprint and barcode data from them to eliminate document sorting and reduce manual data entry.
- **Document separation and identification** — Identify individual document types within large packets or folders without separator sheets, reducing document preparation and folder review costs.
- **Scan-to-archive** — Classify documents and extract multiple index fields to enable reliable posting to a document management system and easy retrieval.

## Features and Benefits

### Reduced Cost with Touchless Processing

By reducing (and in some applications removing) the need for manual document classification, separation and data extraction, organizations can drastically reduce their operational costs.

### Increased Speed

Manual document classification, document separation and data extraction is laborious, tedious and a poor use of knowledge workers' time. By automating these processes, knowledge workers can focus their efforts on value-adding tasks such as customer service or query resolution. Speed of processing is also increased when processes become touchless.

### Increased Processing Capacity

By removing the need for manual document classification, separation and extraction, companies are able to process more transactions each day while maintaining the same staffing levels.

### Higher Data Quality

By automating what used to be manual processes, the system can improve the quality of extracted data compared to manual

keying. Also, powerful data validation capabilities ensure that extracted information is correct before it's used by the business systems to assist in decision-making processes. The result is fewer processing exceptions compared to manual methods, fewer customer queries and more accurate and timely decisions.

### Improved Compliance

Gain a controlled IT-based framework for gathering sensitive customer data as soon as it enters an organization. Powerful data extraction and validation capabilities ensure that the data is correct. Accurate document classification and separation means that content retention and security policies can be applied more reliably.

### Increased Responsiveness

Classify, separate and extract a document in a matter of seconds, and run outside normal business hours if necessary. Consequently, documents can be processed more quickly than by manual methods, reducing the time to complete each transaction and benefiting all parties.

### Increased Data Security

Automatic document processing reduces the need for humans to interact with confidential data, increasing security. By providing the capability to automatically classify documents as they are captured, and feed them into a workflow system for automatic routing, the need for mailroom operators to read documents at the point of receipt is removed. Consequently, the risk of confidential information being exposed in the public domain is decreased. After extraction, sensitive data can be identified and routed only to key personnel, allowing customer privacy and confidentiality issues to be addressed.

### Improved Process Auditing

Automate the processing of documents so that every step can be controlled, monitored and reported on. Better meet the requirements of regulatory compliance and identify bottlenecks.

### One Product for All Document Types

Process structured, semi-structured and unstructured documents, including hand-printed and handwritten forms, invoices, checks, correspondence and any other document type, on the same system. Legacy documents can also be processed, thus avoiding expensive and time-consuming form redesign processing.

### Lower Total Cost of Ownership

Utilize powerful learn-by-example technology for fast configuration of classification, separation and extraction. As documents are processed in a production environment, online learning can be used to "teach" the system characteristics of documents, so they are processed automatically in the future, reducing TCO.

## Ergonomic Keying and Data Validation

Enhance production operator productivity with a customizable validation interface. Separate interfaces are provided for reviewing document classification, single character correction and full field validation.

## Reduced Training Costs

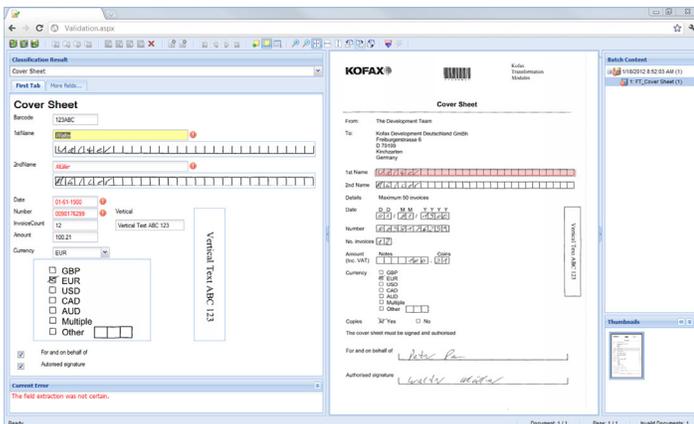
User interfaces are highly customizable to meet customer-specific requirements in terms of screen layout and interface behavior. They can even be configured to mimic legacy systems. This reduces training costs and speeds up the adoption of new systems.

## Powerful Reporting/Auditing Capabilities

Gather detailed information regarding classification and recognition rates and view statistics per user, field, document type and average over user selectable time periods. This allows managers to monitor system performance and get early notification of any issues.

## Leverage Kofax Capture

Kofax Transformation Modules integrates seamlessly with the Kofax Capture™ platform, giving access to the widest range of centralized and distributed document capture and transformation applications and add-on products, including Kofax Front Office Server™, Kofax Web Capture™ and Kofax Mobile Capture™. It also provides high availability and enterprise capabilities to easily scale transformation capabilities, horizontally and vertically throughout any size organization.



Customizable thin-client validation interface maximizes keying operator efficiency

## Why Kofax Transformation Modules?

### Capture and process any document

Supports all documents and information types so customers benefit from a single solution that extends the benefits of capture across the organization, increasing ROI. Many competitive solutions are departmental and focus on specific document types. Few can handle unstructured documents effectively.

### Maximize touchless processing

Uses advanced recognition technologies that provide industry leading extraction rates on all types of text, including machine print, hand print and cursive handwriting in over 140 languages. Higher extraction rates mean greater reductions in manual labor and headcount and more touchless processing.

### Streamlined exception handling

Provides modern, intuitive and customizable user interfaces that allow exceptions to be handled quickly and efficiently.

### Minimize upfront configuration costs

Uses learn-by-example technologies for classification, separation and extraction that can be trained rapidly and work on all document types. Some competitive solutions use complex document templates and rules that take weeks or months to develop, or use auto-templating that doesn't work on letters, reports and other unstructured documents.

### Minimize ongoing maintenance costs

Can learn as documents are processed in production, improving classification and extraction rates on the fly to increase ROI, and removing the need for manual reconfiguration when documents change or new documents are introduced.

### Trust the market leader

With thousands of customers—more than any other direct competitor—Kofax Transformation Modules is mature and proven. Customers trust Kofax for mission-critical enterprise-wide applications that demand scalability, high availability and failover, and distributed capture capabilities.

For more information, visit [kofax.com](http://kofax.com).