

Kofax Capture 10

Course Overview

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The focus of this course is to provide product training for Kofax Capture 10 utilizing instruction and hands-on labs to develop administration and operation skills for the software. The result will provide technical skills necessary to become certified in Kofax Capture 10 and qualified personnel to install, administrate and operate Kofax Capture for Business Process Automation.

This course is intended for experienced technical professionals who are participating in the design, implementation, support and operation of component-based document imaging and forms processing solutions utilizing Kofax Capture. The course will provide a product learning experience and hands-on operation through the use of skill development labs and presentation techniques.

This intensive hands-on course is designed to provide a thorough and complete understanding of the Kofax Capture product, its functionality, configuration, integration and customization. During this course, the attendee will become familiar with the Administration and Operation of Kofax Capture and develop methods for integrating Kofax Capture with other imaging system components. A Certification Exam is included with the course and the goal of the class is to provide knowledge so that a score of 80% or better will be achieved on the Exam and Certification awarded.

At Course Completion

Upon completion of this course, students will be able to:

- Describe and understand the Capture process
- Install Kofax Capture in a Standalone or Client/Server environment
- Upgrade existing Ascent Capture and Kofax Capture installations to Kofax Capture version 10
- Set up Batch, Document, and Folder Classes to optimize efficiency and accuracy
- Create and process batches from Scan through Release
- Explain how Kofax Capture may be customized
- Become Certified in Kofax Capture version 10

Prerequisites

To maximize the learning experience, students should have the following:

- Basic computer hardware/software knowledge
- Operational knowledge of Windows 2003, XP Pro, 2000
- Understanding of folders, files and attributes
- Navigational skills within Windows
- Working knowledge of Client/Server

Course Materials

- All course materials are provided

Hours

- Classroom: 8:30 to 4:30 each day

Course Outline

DAY 1

Module 1 –Introduction to Class

- Duration, prerequisites and materials
- Goals
- Class structure and module overviews

Module 2 – Kofax Capture Overview

- Kofax Inc.
- Document capture
- The Solution: Kofax Capture
- Image cleanup, recognition, extraction
- The production capture process
- Setup and processing with Kofax Capture
- Extensions to Kofax Capture: KFS, KCNS, Import Connectors
- Customizing Kofax Capture
- How Kofax Capture fits into the solution
- New features in Kofax Capture 10
- Licensing
- Enterprise features
- DEMO: Batch class setup and processing

Module 3 - Installing Kofax Capture

- Prerequisites and system requirements
- Terminal Services and VMware support
- Network considerations & configuration
- Installation – server or standalone
- Site Name, Site ID and Station ID
- Folders and files installed
- Attended and unattended queues
- Unattended queues as Windows services
- Multiple system administrators
- Upgrading
- The License Utility
- Kofax Deployment Utility
- MSI Installation
- LAB: Installing and licensing Kofax Capture

Module 4 – Scanner Configuration and Kofax VRS

- The Scanner Configurator
- Connecting a scanner
- Using the Scanner Configuration Utility
- Image Concepts
- Introduction to Kofax VirtualReScan (VRS)
- Properties and profiles
- Introduction to VRS Test Application
- DEMO: Scanner Configuration Utility and VRS Test Application
- LAB: Scanner configuration

DAY 2

Module 5 – Administration and Basic Document Capture

- Administration module
- Online Help
- Batch class setup
- Processing queues
- Separation and form identification
- Document class setup
- Form type setup
- Export connector setup
- Batch class publishing
- Scan module
- Creating and processing a batch
- DEMO: Administration module, batch class setup, scan and process a batch
- LAB: Batch class setup and batch processing

Module 6 – Introduction to Data Capture

- Fields and field types
- Adding processing queues
- Queue properties
- Fixed page separation
- Automatic batch naming
- Document class fields and properties
- Sample pages
- Setting up data or index zones
- Page level bar code setup
- Export connector setup for exporting data
- Validation module
- Validating captured data
- DEMO: Introduction to data capture and zone setup
- LAB: Introduction to data capture and zone setup

Module 7 – Automatic Zonal Data Extraction

- Additional methods of document separation
 - Patch codes
 - Bar codes
 - Kofax separator sheets
- Adding field types
- Adding fields to the document class
- Setting up index zones for automatic extraction
- Recognition engines and recognition profiles
- Testing zones
- Verification
- Recognition Server
- DEMO: Automatic zonal data extraction
- LAB: Setting up automatic zonal data extraction

Module 8 – Automatic Separation and Form ID; Recognition Profiles

- Automatic separation and form identification
 - Full page topology
- Adding form types
- Adding sample pages
- Zone types
 - Modifying recognition profiles
- Image cleanup profiles
- Copy and paste
- Rubber band OCR/ICR
- DEMO: Automatic separation and Form ID; recognition profiles
- LAB: Multi form type setup

DAY 3

Module 9 – Batch Fields, Batch Totaling, OMR, Advanced Recognition

- Batch Fields
- Batch totaling
 - Optical Mark Recognition (OMR) setup
 - Setting the threshold and return values
 - Tips, tricks and testing
- Setting up group zones
- High performance recognition engines
- DEMO: OMR, zone testing and image cleanup
- LAB: Batch totaling, OMR and processing group data

Module 10 – Advanced Batch Class Properties, Database Validation and Export, Batch Manager

- Advanced Batch Class properties -- Partial Batch Export, sorting options, eDocuments, Single document processing and routing
- Database Validation setup
- Export Connector -- Database
- Export Connector -- Email
- Export Connector -- Fax
- Multiple export
- Using Batch Manager
 - Batch listing & refreshing the list
 - Batch Manager tools and menus
 - Help topics and system info
 - Managing batches in-progress
- Batch Class Update
- DEMO: Database lookup, batch class update, and multiple export
- LAB: Database lookup, database export, partial batch and multi batch export

Module 11 – Extending Kofax Capture: KCNS, Import Connectors, KFS

- Kofax Capture Network Server (KCNS)
- Kofax Front Office Server (KFS)
- Kofax Capture Import Connector – Web Services
- Kofax Capture Import Connector – Folder
- Kofax Capture Import Connector – XML
 - Functions and setup
 - Creating batches
 - Licensing requirements
- DEMO: Kofax Capture Import Connector – XML
- LAB: Kofax Capture Import Connector

Module 12 – Kofax Capture Import Connector – Email

- Overview of KCIC – Advanced Email and Fax
- Introduction to KCIC -- Email
- Batch class compatibility and limitations
- Installation
 - Setting up the KCIC -- Email service account
 - KCIC -- Email service
 - Administration plug-in
- Configuration
 - DEMO: Installing, configuring, and processing with the Kofax Capture Import Connector – Email
 - LAB: Kofax Capture Import Connector – E-mail

DAY 4

Module 13 – OCR Full Text and PDF Conversion

- OCR Full Text definition
- OCR Full Text configuration
 - Batch class setup
 - Document class setup
 - Export setup
- PDF properties and output
- PDF configuration
 - Batch class setup
 - Document class setup
 - Export setup
- DEMO: OCR Full Text and PDF setup and processing
- LAB: OCR Full Text

Module 14 – Quality Control and VRS QC Later

- Exception or explicit queue
- Reviewing images and verifying documents
- QC Station options views, filters, performance and preferences
- VRS QC Later
- Unattended scanning
 - DEMO: Quality Control setup, VRS and VRS QC Later
 - LAB: Quality Control, reviewing images and documents

Module 15 – User Profiles, Tracking, Report Viewer

- Enabling User Profiles
- Setting up groups & limiting or allowing access to batch classes & queues
- Setting user profiles & rights
- Copying groups and users
- Login and password setup
- Single sign-on
- Linking with Active Directory
- User tracking and reporting using turnkey reports and the Report Viewer
- Security Boost
- DBUtil
- DEMO: DBUtil and Security Boost
- LAB: User Profiles and Tracking

Module 16 – Customization Options

- Reference Material
 - Sample Source Code
 - Developers Guide
 - API Reference Guide
- API Reference Guide
- Custom Scripting with SBL and VB.NET
- Export Connectors
- Custom Elements
- Custom Extensions
- Custom Modules
- Workflow Agents
- Batch Workflow
- Customization Deployment
- Custom Notes
- DEMO: Batch workflow and CMSplit, using a workflow agent, using a validation script
- LAB: Batch workflow and CMSplit, using a workflow agent, using a validation script

Module 17 – Batch Class Export and Import, Form Design

- Creating and exporting a cabinet file
- Importing a cabinet file
- Best practices for import
- Designing and analyzing forms for document capture
- DEMO: Batch class export and import
- LAB: Additional form setup, cabinet file export and import

DAY 5

Module 18 – Browser-based Deployment

- Benefits
- Requirements
- Setup
- Running Kofax Capture from the browser

Module 19 – Available Resources

- The Kofax Web Site
- Reseller Partner benefits
- Software Maintenance and Support
- Additional value-add services – Professional Services and Education Services
- Class Resources

Module 20 – Kofax Capture Review

Module 21 – Certification and Testing

- Certification requirements
- The Certification Exam
- Taking the exam
- Receiving your certificate
- CERTIFICATION EXAM