

Kofax OpenForms360

Automate your document-driven business processes.

OpenForms360 is an advanced document processing add-on to ControlSuite and AutoStore to automatically process structured, semi-structured and unstructured business forms and documents.

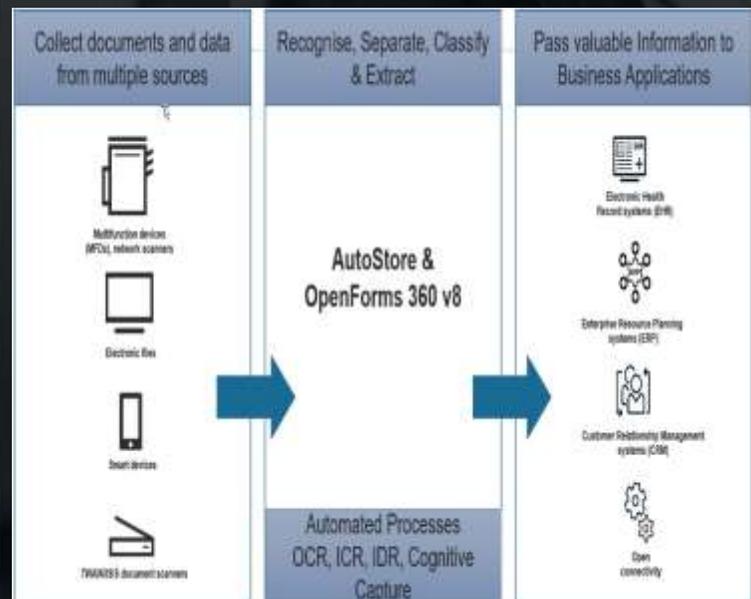
WHAT IS OPENFORMS 360?

The Kofax ControlSuite family is all about the Capture, Processing and Routing the information from start to finish in the best possible workflow process. These processes can include the conversion of documents and images to archive ready PDF/A compliant electronic documents, but also include the additional features of barcode recognition and reading, data extraction from the documents and the processing and addition of support data from other business systems to ensure that information extracted or collected is verified and correct before being passed to the organizations back end systems.

One of the best ways of doing this is to reduce the impact that human intervention can have on the processing of the documents and information. Doing this by the use of OCR, ICR, IDR and verification methods allows the process to run smoothly with human intervention only required for the exceptions to the process.

The ControlSuite add-on functionality provided by OpenForms 360 allows advanced processing of Structure, Semi-Structured and Unstructured documents into business processes within the organization.

OpenForms 360 allows tasks to be completed more quickly and more efficiently by reducing the need for manual data entry of information from documents being received by the organization. Speeding up the business process by using digital workflows and improving data quality which in turn can reduce compliance risks.



PRODUCT SUMMARY

KEY FEATURES

- Automatically extracts, validates and routes data from documents captured by Kofax ControlSuite and Kofax AutoStore.
- Process structured, semi-structured forms and unstructured documents.
- Recognizes hand-print, barcode, checkmarks and machine print.
- Performs data verification with intuitive tools

AUTOMATED RECOGNITION

OpenForms 360 provides the power to automate document separation, classification and data extraction. For this, OpenForms 360 provides several automation methods that can be configured according to the destination of the document. Some type of documents include:

Structured Documents

These are typically forms with a fixed location for each piece of data. These could include Hand Print completed forms, checkboxes etc.

Semi-Structured Documents

These are typical business documents such as Invoices, Purchase Orders and Delivery Notes etc. They follow a general layout pattern so that rules can be defined concerning where to look for certain pieces of business information, however unlike structured documents there is no fixed location for the information.

Unstructured Documents

These are general business-to-consumer or business-to-business correspondence which follow no regular pattern. Only the syntax of the information and the semantic pattern can guide the search for information.

DOCUMENT SEPARATION

OpenForms360 can assemble a batch of batch of joined images into documents. The separation points in the process are defined by the content of the extracted data fields.

DOCUMENT CLASSIFICATION

Document classification is used to determine the relevant business process that the document should be processed by. Documents are classified into different document classes and this is used to control what kind of metadata needs to be

extracted from the document.

Several options to determine the document class and these can be combined to provide the best possible classification process.

Adaptive Classification is a learning algorithm which uses several samples from each document class and extracts the characteristic features of the documents. Each subsequent document that is to be classified is then compared against these features and classified accordingly. Allowing the system to learn. This method is well-suited for unstructured documents.

Rule-Based Classification uses a set of classification rules to identify each document. These rules typically use phrases and combinations of keywords to locate information to be extracted from the page. This approach is best suited to semi-structured documents such as Invoices, Purchase Orders etc.

Pre-set values which are obtained by AutoStore at the point of capture can also be used to classify the document.

DATA EXTRACTOR

Data extracted from documents is used as metadata in the business process to ensure that the document is routed to the correct location or person. The set of extraction methods that can be applied to a document are any combination of the following:

- Barcode, Patch Code
- Optical Mark Recognition (Tick or Checkboxes etc.)
- Forms Reading (fixed, anchored location, hand print and machine print)
- Free Forms recognition (rule-based extraction)
- Adaptive Reading – learning through the validation operator
- Database-driven recognition (match a record in a database with the document data)

DOCUMENT VALIDATION

OCR, ICR and IDR, although they have a high accuracy rate, do not always extract all required data. Due to dirt, document damages, irregular fonts or very unusual document layout, some data will not be identified with a sufficient level of confidence.

For these cases, a validation client is available to allow the operator to verify or correct data extraction, by manual entry or click on the correct information on the document

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