

# Move Up to TotalAgility



# Limitations of Your Current Capture Solution

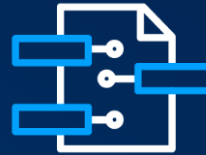
- Workflow restricted to capture and not the rest of the business process
- Thick clients, multiple products, multiple user interfaces, multiple integration points
- Frequent scripting for custom workflow agents and business rules
- Ideal for batch capture, but not for transactional, collaborative processes
- Analytics is restricted to capture only, with no visibility into how to improve process efficiencies

# TotalAgility delivers advanced capabilities and Gen AI innovation to extend your capture use cases today



## Deploy Faster with Gen-AI

Accelerate the deployment of new use cases by up to 80% with our advanced generative AI technology.



## Enhance Document Extraction

Tap into superior, ready-to-use capabilities, including a Document Library with pre-built industry extraction models and advanced Copilot functionalities, for more precise and efficient document handling.



## Seamless Integration

Integrate smoothly with existing business applications using over 300 pre-built connectors, along with web services.



## Low-Code Platform and Collaboration

Move beyond capture with our intuitive, low-code workflow engine that simplifies development and fosters a collaborative environment.



# Deploy Faster with Gen-AI with Copilots



## Copilot for Extraction

Reduce model setup time  
Improve STP Rates  
Reduce Maintenance costs

**Up to 80% reduction  
in model  
design time<sup>1</sup>**



## Copilot for Insights

Accelerate Decision Making  
Amplify Productivity  
Harness untapped data

**50% see 'Gen AI for  
insights' as highest  
impact use case**



## Copilot for Development

Simplify design experience  
Broader & standardized innovation  
Greater intuitiveness of software

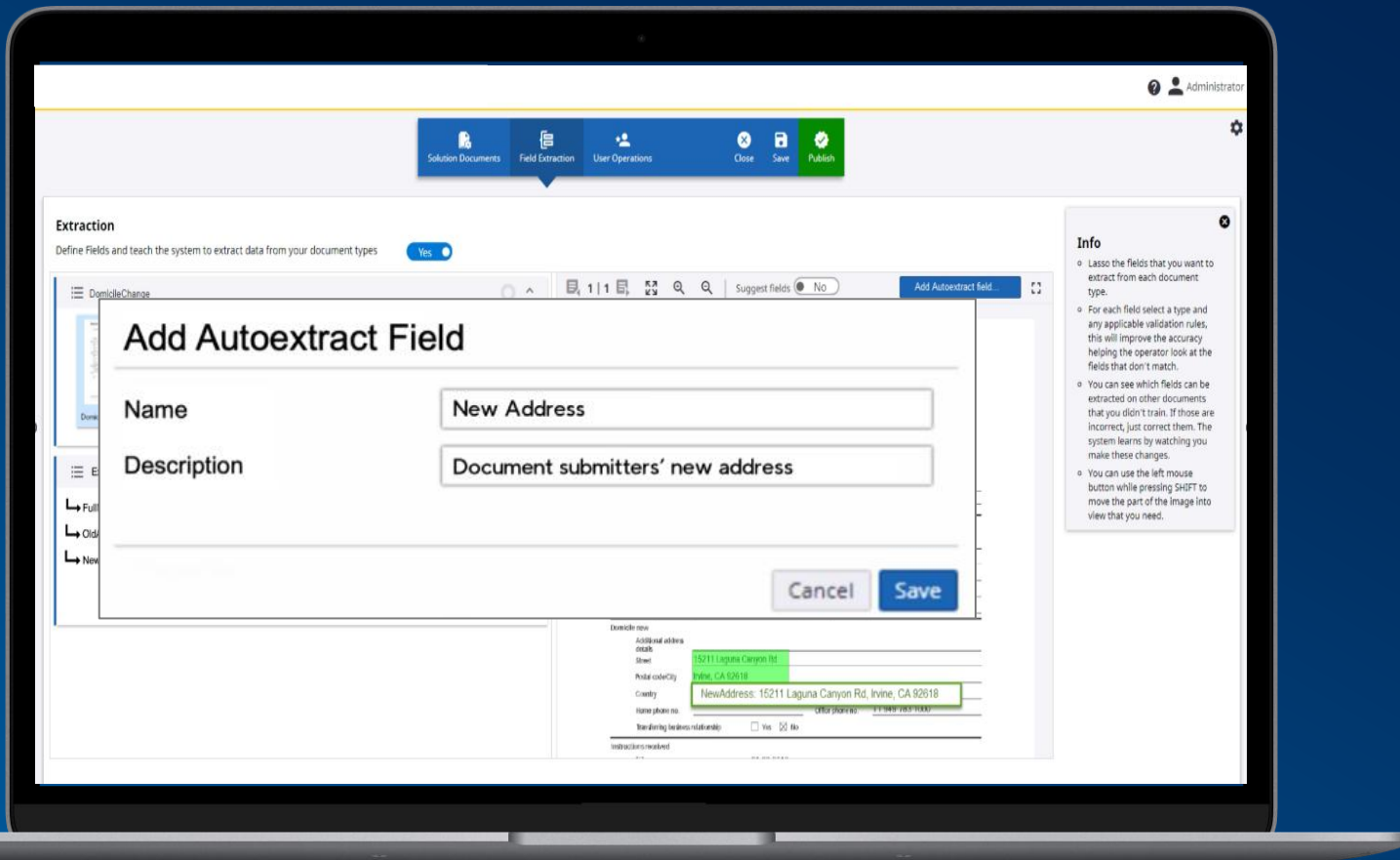
**40%-60% acceleration in  
developer productivity**

- Conversational interface transforms how users interact with software
- Enables users of all technological skill levels to create solutions
- Accelerates time to value, unlocks deeper business and uplifts productivity





# Enhance Document Extraction with Copilot for Extraction



- Up to **80%** reduction in time and effort to build and maintain extraction models
- Improve straight-through-processing rates
- Decrease customer cost of ownership



Solution Documents



Field Extraction



User Operations



Close



Save



Publish

## Solution details

Solution name *	<input type="text" value="AddressChange"/>	What is the language of your documents?	<input type="text" value="English"/>
Separation Profile	<input type="text" value="&lt;none&gt;"/>	Allow capture using MFD only	<input type="radio"/> No

## Document types

+ New Document Type

DomicileChange



1

Default

Yes



Drop file(s) here  
or click below to  
upload

## Info

- Give your capture solution a good and unique name, it will be visible at runtime.
- Select the language of the documents to be processed to help the system process them using the right settings.
- Set up as many document types as needed and pick one that is the default, all documents that the system cannot identify will end up here.
- Upload sample documents
  - Use clean, well readable documents with no scan artefacts or low resolution.
  - Make sure to put only samples of the same type into a document type.
  - It is recommended to provide 3-5 samples if the document is a fixed form or semi structured form e.g. an application form or Sales order, or 10-20 samples if the document is unstructured like a legal contract or customer letter.
- Train your documents to have the system start learning how to distinguish the document types, the system will also automatically collect more samples at runtime when needed.



# Enhance Document Extraction with Document Library

Regions Bank Statement of Account. Account: 123456789. Balance: \$1,234.56. Transaction history table with columns: Date, Description, Debit, Credit, Balance.

1040 U.S. Individual Income Tax Return 2022. Taxpayer: John Doe. Filing Status: Married. Total Income: \$123,456. Total Tax: \$12,345.

MyEnergy electricity invoice. Your electricity usage for the month of January 2024. Your Direct Debit of \$123.45 will be collected on or immediately after 17 January 2024.

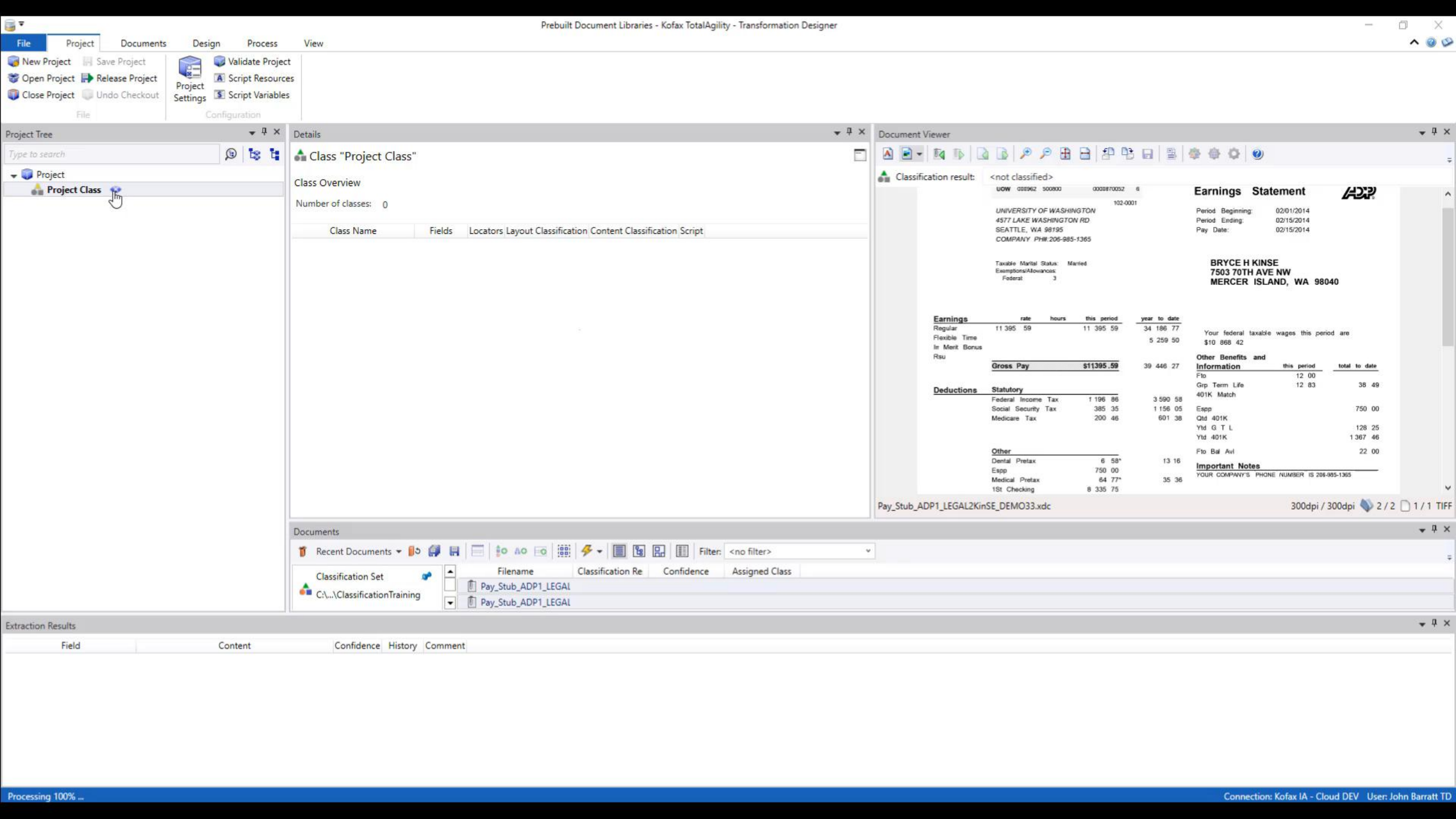
W-2 Wage and Tax Statement 2022. Employee: John Doe. Employer: ABC Company. Total Wages: \$123,456. Total Taxes: \$12,345.

ABC Company Earnings Statement. Employee: John Doe. Pay Period: Feb 19, 2020 to Feb 25, 2020. Total Earnings: \$1,234.56. Total Deductions: \$123.45. Net Pay: \$1,111.11.

- Access hundreds of pre-trained extraction models across a variety of use cases
- Accelerate time to value
- Reduce training time

Now Available

Bank Statements	International IDs	Passports	Pay Stubs
Utility Bills	Logistics Documents	US Tax Forms	And More!







# Enhance Document Extraction with No Training Extraction



Email



Chat



Office



Web  
Forms



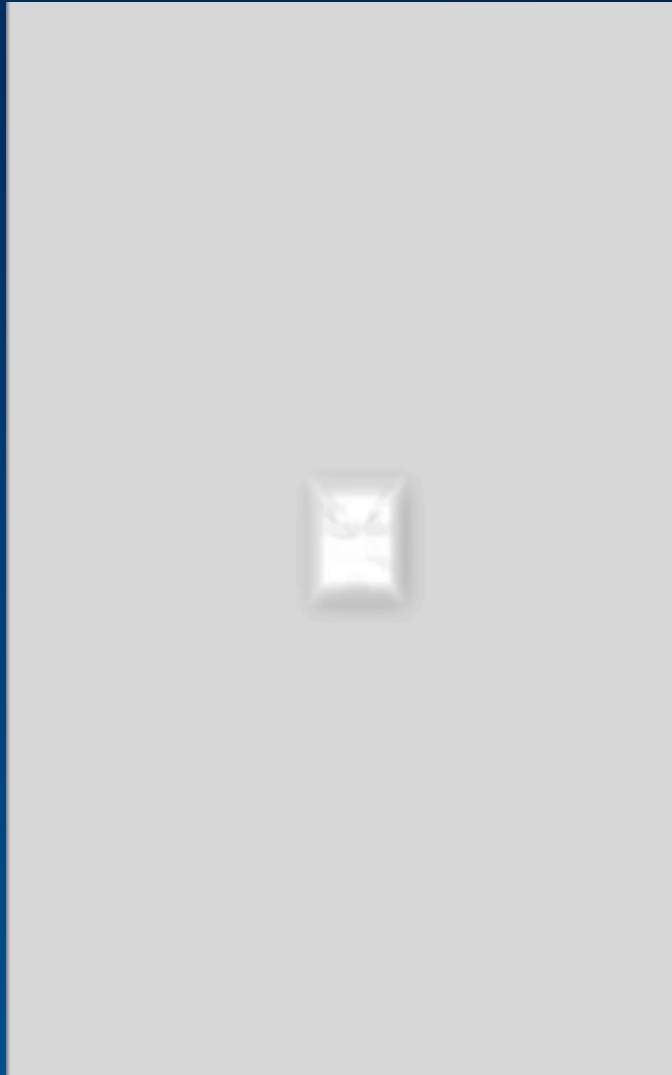
Mobile



Paper



PDF



- Automatically identify key-value pairs & create new models with zero training
- Reduce time to value
- Reduce development expertise & effort

- Home
- Kofax Copilot
- Quick Capture
- Quick Classification
- Quick Workflow
- Quick Skins
- Quick Rules
- Quick RPA
- Business Data
- Import

## Welcome Administrator

Select one of the links below to get started



### Kofax Copilot

Get started quickly with Copilot. This enables you to effortlessly generate Quick Workflow solutions with minimal or no training, with the support of Generative AI technology.



#### Quick Capture

Create a capture solution: upload and train sample documents, extract data and design the workflow that should be used to process these.



#### Quick Classification

Easily modify existing classification groups.



#### Quick Workflow

Automate routine processes by creating a Quick Workflow; collect data, route tasks with conditional logic and rules.



#### Quick Skins

Create/Modify Quick Skins to create different variants of a process template.



#### Quick Rules

Modify business rules using a decision table format.



#### Quick RPA

Orchestrate RPA robots by utilizing robots in a dedicated workflow.



#### Business Data

Update key business data to drive business rule behaviour.

[Advanced TotalAgility Designer](#)



## Seamless Integration

Customize TotalAgility with integrations and expertise designed to meet your unique business needs:

### Tungsten Marketplace

Access 300+ free and paid pre-built connectors, frameworks, templates, bots, scripts

### Partner Ecosystem

Gain the expertise of over 1,000+ partners

### Business System Connectivity

Integrate with your existing applications, legacy systems and business systems of record

## Key Partners & Integrations





## Hosting Flexibility



### Flexible

Deploy on-premises, in the cloud or both on virtual machines or containers



### Scalable

Infrastructure scaled up and out elastically as needed



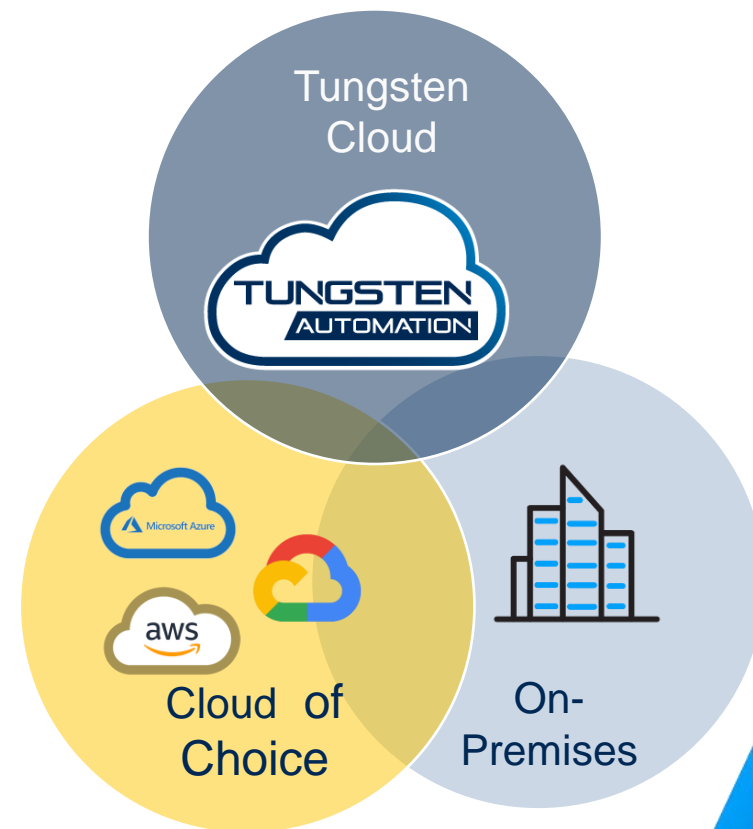
### Reliable

Redundant services and always-on database for high availability and disaster recovery



### Secure

Encrypted data at rest and in motion coupled with SSO





# Leverage Professional Services to Move Up to TotalAgility

## PACKAGE Move Up Basic for Capture

*For customers using Capture only.*

- Capture to TotalAgility Assessment & Report
- Hands-on Best Practice Session
- Best Practice Advice

60 hours of consulting over 3 weeks

## PACKAGE Move Up Expert for Transformation

*Includes Basic Offering, plus:*

- Transformation to TotalAgility Assessment & Report
- Hands-on Best Practice Session
- Best Practice Advice

120 hours of consulting over 6 weeks

## CUSTOM SOW Custom Migration Services

*Full implementation support by Tungsten Automation PS consultants and architects*

- Reduces customer effort of migration
- Tailored solutions to maximize investments
- Dedicated, efficient transition to TotalAgility
- Cost-effective rates utilizing resources dedicated to Move Up efforts for scalability

# Professional Services & Training Package Offerings

		Tungsten Automation Subscription Benefits	Move Up Basic for Capture	Move Up Expert for Transformation
 <b>Tungsten Automation Learning Cloud</b>	TotalAgility 8 Professional Developer, Administrator or Executive	✓	✓	✓
	Migrating KC/KT to TotalAgility	✓	✓	✓
	TotalAgility Apps 8.0 Blended Learning		✓	✓
	TotalAgility Architecture, Components, Implementation		✓	✓
	TotalAgility Citizen Developer		✓	✓
 <b>Assessment &amp; Report</b>	Batch Classes (Recommended Batch Class)		✓	✓
	Transformation Projects (Classification Project & 2 Extraction Classes)			✓
 <b>Hands On Best Practices Session</b>	Basic Capture Process, Import & Export, Batch & Doc Class Settings		✓	✓
	Database Validation		✓	✓
	Fixed Form Extraction, Barcode Recognition, Standard Validation Forms		✓	✓
	Standard Validators & Formatters			✓
	KC/KT Migration Tool; Migrating Content, Layout & Script Classifiers			✓
	Existing Locators Migration, Including Script Locators			✓
 <b>Best Practice Advice</b>	Migrate Custom Functionalities & Modules		✓	✓
	Replace Scripted Validators & Formatters with Business Rules			✓
	Customize Validation Forms Using Multifield Validators & Post-Validation			✓
	Implement Multistep Validation, Document Variants & Activity Variants			✓



## Move Up Case Study

# Large US Bank Moves Up from Capture & Transformation to TotalAgility

This long time Capture & Transformation customer with an unlimited license moved up to the TotalAgility platform for these reasons:

- ✓ Rapid development of new document-centric use cases
- ✓ Connectivity with other business process automation technology in their existing ecosystem
- ✓ Flexible deployment with cloud readiness
- ✓ Additional capabilities including AI, applicable frameworks, business rules, drag and drop activities, scripting in a process flow

## 70%+

of bank's requirements  
addressed by TotalAgility

## 5 months

from purchase to get  
TotalAgility up and running

## Expanded

the number of use cases throughout the organization

“Capture & Transformation was initially implemented to streamline the bank's back-office processes. With TotalAgility, automation expanded to include return mail and front-office operations, such as loan origination, income verification, W2s, paystubs, and bank statements. The scope continues to grow across business lines, showcasing the platform's versatility and impact.”





# Deutsche Rentenversicherung Automates Incoming Mail

Deutsche Rentenversicherung insures 57 million people. Their inboxes receive 300,000 pages daily, and 77 million pages per year. They rolled out Capture as a first step towards automation, but it quickly outgrew their ever-increasing requirements. They then upgraded to TotalAgility for these reasons:

- ✓ Fosters innovation with the latest technologies
- ✓ More autonomy in addressing change requests
- ✓ Enhanced stability during peak workloads
- ✓ Easy to upgrade on an ongoing basis
- ✓ Highest level of data security

# 50%

Shorter processing time

# 80%

Automated incoming  
mail processing

# Increased

Employee motivation by adapting tasks

“We’re glad that we were able to work with a team of professionals dedicated to the project right from the start. They guided us steadily through the migration.”

**Ronny Stein,**  
Head of Scanning and Projects,  
DRV Rhineland-Palatinate, Speyer





# Thank You

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