

Base64.ai KTA Connector v1

Pocket Guide

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Version 1.0

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Base64.ai Partnership Overview

In December of 2023, the Kofax Ecosystem formed an official ISV Co-Sell Partnership with Base64.ai as one of our 3rd party Doc Library partners. This partnership was formed to fill gaps in our Doc Library capabilities for both our core verticals (Banking, Insurance, Government, Healthcare and Manufacturing) as well as regional document types.

Base64.ai is a cloud-based Doc Library service that instantly and accurately extracts text, data, handwriting, photos, and signatures from all types of documents—including IDs, driver's licenses, passports, visas, receipts, invoices, forms, and hundreds of other document types. Click here to see a list of supported Document Types.

Base64.ai discerns the document's type with a single API call, extracts relevant information, verifies the results, and sends the results back in JSON format.

What is the Base64.ai TotalAgility Connector?

The Base64.ai TotalAgility Connector from Kofax Labs is a Package that provides the assets you need to connect to Base64.ai's API. This Connector is designed to be easily installed and to get you up and running to test out a prepackaged process:

The screenshot displays the Tungsten Automation TotalAgility Workspace interface. On the left, a table lists extracted data from a W-2 form with columns for Key, Value, and Confidence. The table includes fields such as Model, OMB No, Employer identification number, Wages, Federal income tax withheld, Employer's name, Social security wages, Medicare wages and tips, Medicare tax withheld, Social security tips, Allocated tips, Control number, Employee's first name and initial, and Suffix. The right side of the interface shows a visual representation of the W-2 form, with fields corresponding to the data in the table. The form is titled 'W-2 Wages and Tax Statement 2023' and includes a 'Complete' button at the bottom left.

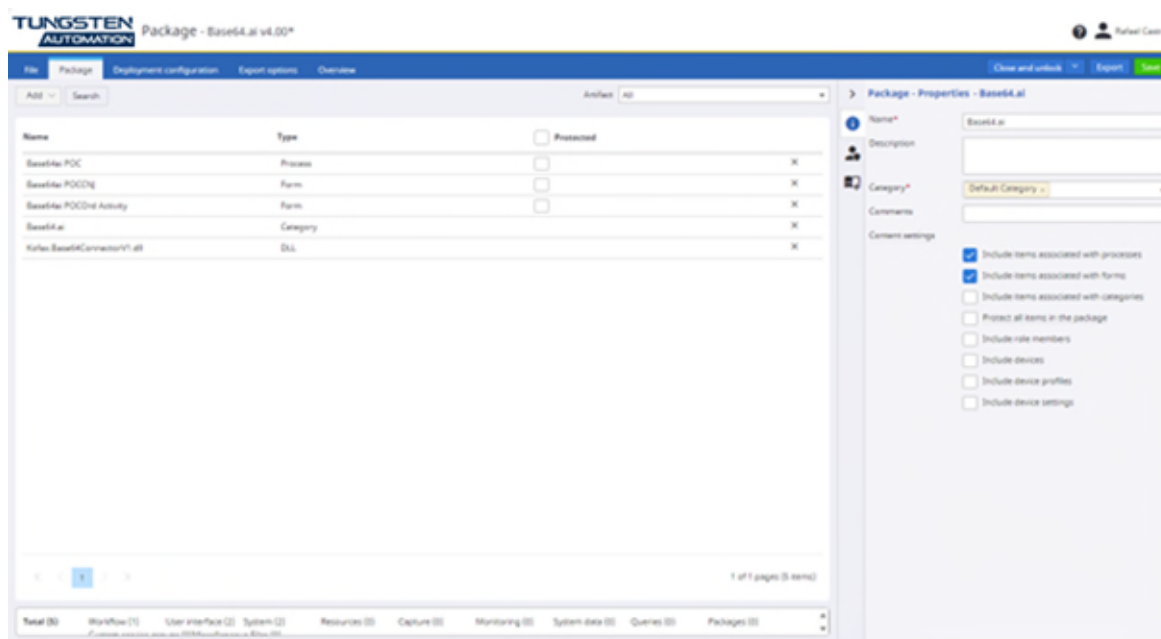
Key	Value	Confidence
Model	IRS Form W-2: Wage and Tax Statement (Info Copy Only)	1
a Employee's social security number	22222a111-22-6666	1
OMB No	1545-0008	1
b Employer identification number	123-45-678	1
Wages	106,800	1
Federal income tax withheld	10,800	1
c Employer's name	My company 1 Memory Lane, San Diego CA 92110	1
Social security wages	106,800	1
Social security tax withheld	11,800	1
Medicare wages and tips	106,800	1
Medicare tax withheld	12,800	1
Social security tips	0	1
Allocated tips	0	1
d Control number	ABC123	1
Employee's first name and initial	JohnDoe	1
Suffix	1234 MyStreet Street Some Town, FL 33186	1
Checkbox statutory/employee	No	1

Technical Assets included in the Package

The following items are contained in the Base64 Connector TotalAgility Package.

Package Contents

- **Business Process:** Provided as an example of how to call the DLL and process the data results. This sample Business Process is used in the Demo and can be cloned to suit your needs.
- **DLL:** .NET Framework v4.8 DLL (Kofax.Base64ConnectorV1.dll) which performs all the necessary functions to communicate with Base64.ai's API and return the extraction information
- **UX Form:** Used to run the demo that includes uploading a document and displaying the name, value pairs returned from Base64 API and to preview the results.



How do I download the Base64.ai KTA Connector from Marketplace?

The solution is available at [Base64.ai Extraction Connector for TotalAgility | App Marketplace \(kofax.com\)](https://kofax.com/marketplace/solutions/base64-ai-extraction-connector-for-totalagility) and downloadable from [Github](https://github.com/kofax/Base64ConnectorV1). It comes with a detailed readme file which describes how to set up the solution in KTA.

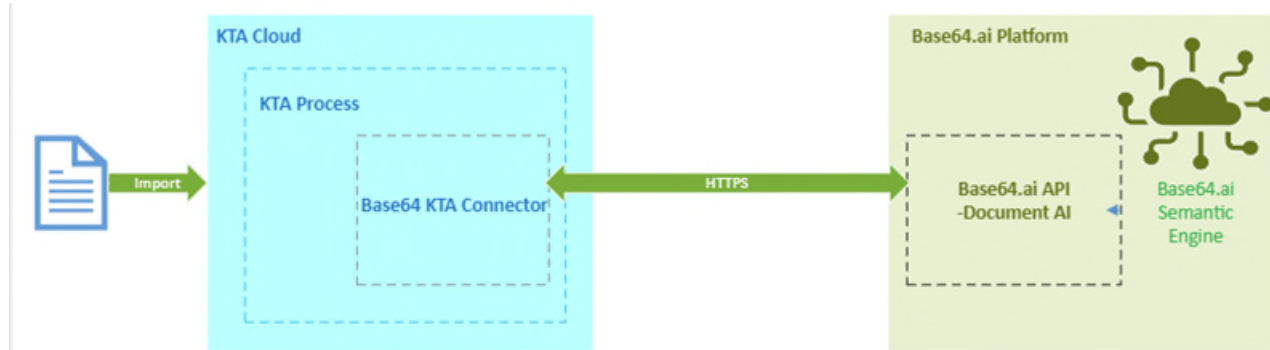
How does the Base64.ai KTA Connector work?

The connector interacts with Base64.ai's Document AI API with the following steps:

1. Uploads the document, passing an argument to limit the number of pages to process.

2. Wait for the extraction results & translating the results and passing a simple 3 column string array with the name of the field, text extracted, and confidence.
3. Results are then made available to your calling process.

Architecture of the Base64 Connector



Kofax Labs is also offering the source code for the connector, so it can be changed and adapted to the client's needs, or to take advantage of Base64.ai additional APIs (Face, signature, redaction, etc).

The connector is written in C# .Net 4.8 (compatible with KTA v7.11), and it utilizes some external libraires which are merged into a single dll.

The library follows the best practices as published in Kofax's "Building TotalAgility Connector" document.

Getting started

To get started using the connector, please follow the steps below:

1. Follow the steps to install the Package to a KTA instance
2. Create a Base64 API Key - Visit the Base64.ai website and sign-up.
3. Once you're signed up, on the Base64.ai site, please browse to "Integrations", and under "Option 2", please get your API Key; we're going to need this to use the connector later.
4. Import the Kofax.Base64ConnectorV1.dll into your KTA instance.
5. Upon creating your workflow item, you will need to create a data model using the following JSON structure:


```
{ "FIELD1": [ { "Key": "This is the key", "Value": "This is the extracted value", "Confidence": "0.9" } ] }
```
6. This data model will serve as the variable type for the variable that will hold the Base64.ai extraction results and can be either local or global to your KTA instance.
7. To call the connector from your workflow item, create a .Net activity, and configure it like the following screenshot:

Configure .Net activity

Assembly details		Parameters		
Assembly file path*	Kofax.Base64ConnectorV1.dll (Browse) x	Name	Type	Value
Class*	Kofax.Base64ConnectorV1.Base64Connector	ktaDocID	String	Document.InstanceID (Process variable) x
Method*	Base64GetExtractionResult	docFileExtension	String	FileExt (Process variable) x
		pageCount	Int32	PageCount (Process variable) x
		ktaSDKUrl	String	KTA_SDK_URL (Server variable) x
		ktaSessionID	String	SPP_SYSTEM_SESSION_ID (Server variable) x
		Base64Token	String	Base64Token (Process variable) x
		Return Parameter	String	Base64Result (Process variable) x

- ktaDocID: The KTA document instance ID for the document you want to submit
 - docFileExtension: The document's file name extension (for example ".pdf", ".tif", etc).
 - pageCount: The limit of pages you want Base64.ai to process; "0" means all.
 - ktaSDKURL: The URL for the KTA SDK instance you want to connect to get your document.
 - ktaSessionID: Your KTA session's ID.
 - Base64Token: The token you obtained previously from the Base64.ai web page.
 - Return Parameter: Use the data model type created on the previous step to receive the extraction results.
8. Once the variable has been populated with the extraction results, you can either use it in an ordinary activity to display the results or use a loop to iterate through it and do your post-processing.

Why Kofax Marketplace?

Kofax Marketplace is a digital showcase of assets connecting customers with pre-built, integrated components and solutions to extend their digital workforce. The Base64.ai KTA Connector will be easily available in the Marketplace, built on top of Kofax's Intelligent Automation platform. It accelerates customer automation journeys and reduces the need for custom development work. The Kofax Marketplace also allows partners to expose their value-added solution to new prospects and customers.

Frequently Asked Questions?

Below is the list of possible questions gathered to answer the basic questions about storage and extraction.

Storage

Is data stored in the cloud? And how long is it stored?

Yes. To ensure maximum system performance and support flexibility, the Base64.ai service is offered primarily via the cloud and it is not intended as a long-term storage repository. Thus, uploaded documents expire and are removed from the system after 30 days by default. The expiration duration is also configurable, from 1 to 60 days. Please review your Base64.ai Flow configuration for more information.

How do you secure the transfer of the data? and what happens after the document is uploaded to the server?

Data transfer is handled via secure TLS connection. Each user is authenticated using an API key in the https header. Data is encrypted in transit and at rest. Transport Layer Security (TLS, protocol version 1.2) is utilized for encryption during transport. Base64.ai & KTA support high-grade 256-bit ciphers as well as ciphers providing forward secrecy. Once data reaches Base64.ai, it is processed and stored in a client-specific object store on a 256-bit encrypted disk.

Certified for ISO, HIPAA, SOC 2, and GDPR, Base64.ai cloud and on-premise solutions offer top quality data extraction at the highest security standards.

How many documents can the system process simultaneously?

Although the connector is designed to handle one document at a time, this can be used in multiple processes/jobs to run in parallel and independently from one another. The only limit you have is the number of documents that can be processed daily as per your license.

Detection

What type of files does Base64.ai support?

Both KTA and Base64.ai support a wide variety of files. You can either use KTA's industry leading image processing feature to improve the quality of the document prior to be sent for extraction to Base64.ai (image processing is not currently offered in their API), or you can send the raw file for processing.

How long does it take to process a document?

Depending on the size of the document and number of fields to extract, it can take anywhere from 15 seconds to a couple of minutes.

What document types are supported?

Base64.ai supports documents from a wide variety of countries and their AI automatically recognizes, classifies, and processes over 2,830 document types without the need for any additional machine

learning training.

If you cannot find your document type, Base64.ai Semantic AI model enables Base64.ai to process documents has never encountered before.

Are there any limits when it comes to the size of the document?

Although Base64.ai does not put a limit on document size, you should follow best practices and try to keep it under 20mb.

Who do I need to contact to get the Base64.ai API private keys or user credentials?

Please visit the Base64.ai Website (<https://base64.ai>) and sign-up; once you have your credentials registered, you can get your API key from the demo page or your user settings. Private keys can be re-generated any time, and you can monitor your usage by selecting it under your user profile.

Once the package is downloaded and imported in KTA, the private key can be replaced in the server variables section as described below:

Key	Value
BASE64_API_TOKEN	Optional – Base64.ai API Token obtained after you have signed up for an account; this would be used globally in KTA for all calls.
Base64Token – process variable	Variable within the process to allow for multiple API Tokens for each call.
Do not change below, unless consulted or advised	
KTA_SDK_URL	Internal to KTA – URL for the KTA RESTful API SDK.