IBM Intelligent Forms Processing Services Offering - Forms Training Utility

Overview
IBM’s Intelligent Forms Processing Services Offering (IFP) provides a powerful Forms Training Utility (FTU) to define forms and the fields of data found on forms that IFP processes. If your forms never change, defining your forms with FTU can be part of the implementation services that IBM offers with the IFP software. Thereafter, if you want to add new forms or your forms change, FTU enables you to do so. FTU includes sophisticated business rules, edits, table look-ups, and dictionaries to improve the results of OCR/ICR and to apply validation routines that help the data repair operators (using other IFP applications: Data Verification, SmartKey, and Original Entry) do their work. FTU also defines output rules for the exported data from IFP to your legacy system.

Benefits of FTU
- **Easy to use** - the FTU graphical user interface allows non-technical users to add new forms or modify existing forms at any time (no programming is required).
- **Centralized** - FTU is the single IFP application used to define the hierarchy all of your forms and form versions, data-capture fields, edit rules, document reference indices, and many other OCR/ICR parameters.
- **Powerful** - FTU is one of the standout applications that distinguish IFP from the competition. FTU includes the function to define single or multi-page documents, required page attachments, different versions of documents, labeled forms, field OCR confidence parameters, different and multiple OCR engines per field, data types (e.g. numeric) per field, cross page field rules, and field location geometry. All this function is defined for each form without limits on the number of form types, versions, fields, or pages. When you are training a form, FTU validation rules enable you to find errors and/or inconsistencies in the training before it is used to process production forms. The FTU application stores all of this information on the IFP file server in a DB2 database where it is accessible by all of the other IFP applications.
- **Extendable** - FTU base application includes many common syntax checks, functions, and edit rules for your use (e.g. dates, amounts, addition, subtraction, and text manipulation). However, you can also write your own custom syntax checks, functions, and rules for custom purposes and assign it to a field using an exit routine included in FTU.

Highlights
FTU organizes your forms in a user-defined four-level hierarchy (e.g. year, business area, form type, and version). Your FTU hierarchy determines how you batch documents together for IFP processing, starting with scanning. The IFP Forms Processing application uses this hierarchy to recognize exactly what form and version it is, and thus know where to find the data on the form.

For each form type, you can specify required and/or optional pages and other processing options like forms template dropout.
FTU allows you to define field output rules and parameters used to index images, perform more data validation, and format the data as required by your legacy system.

In FTU, on each form you draw boxes to define the data capture areas (input fields) and then define the field attributes (e.g. font type, data type). Per field, you can also specify which OCR/ICR engine(s) should be used and multi-engine voting settings.

FTU lets you enter business logic rules such as math checks, table lookups, and conditional tests using a drag & drop interface.

The rules interface also lets you construct an output field from one or more input fields. One version of a form may have month, day, and year as separate input fields and IFP lets you join them together as one output field.

**FTU Advanced Features**

Advanced features of FTU include:

- **Label and bar-code processing.** If your forms have stick-on labels or bar-codes, FTU enables Forms Processing to locate them on the page and read them correctly. You can define rules so that the IFP Forms Processing application uses the label or barcode data instead of similar data derived from other input fields on the same form.

- **OCR/ICR engine options.** FTU lets you set many OCR engine-specific options in case the default values are not sufficient.

- **Extensive data validation techniques.** Dictionary lookups, table lookups, regular expressions, and length and range checks can all be used to validate your data.

- **Image pre-processing options.** Form templates dropout can be done to improve the OCR/ICR accuracy and to reduce image file size (much less storage needed). FTU also offers erosion/dilation, field expansion, and noise removal and line removal to further improve OCR/ICR accuracy.

- **Form recognition.** FTU recognizes most forms automatically; even when there are many similar versions (e.g. HCFA 1500 Medicare forms).

For additional information contact your IBM marketing representative or visit the IFP web site at [www.clearlake.ibm.com/gov/ifp](http://www.clearlake.ibm.com/gov/ifp)

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