# What Can Capture Do For You?
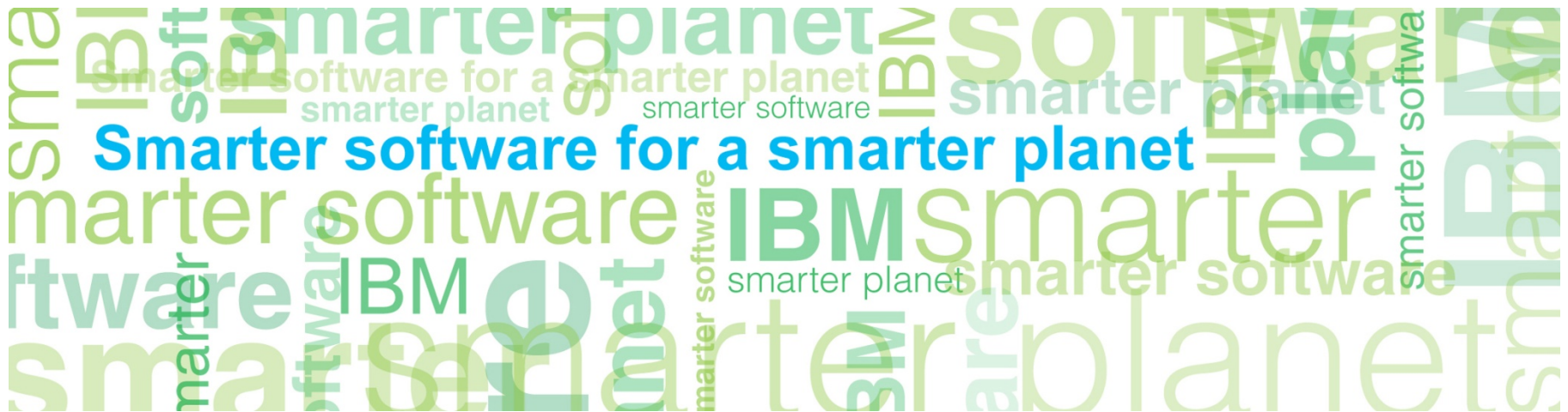## Evaluating IBM Datacap Taskmaster Capture

Presenters: David Jenness, Tom Simalchik

Date: March 17, 2011

Smarter software for a smarter planet

# Today's Questions

- What can document capture do for you?

- What varieties of capture are there?

- What does IBM offer for capture now?

- Why is IBM capture interesting?

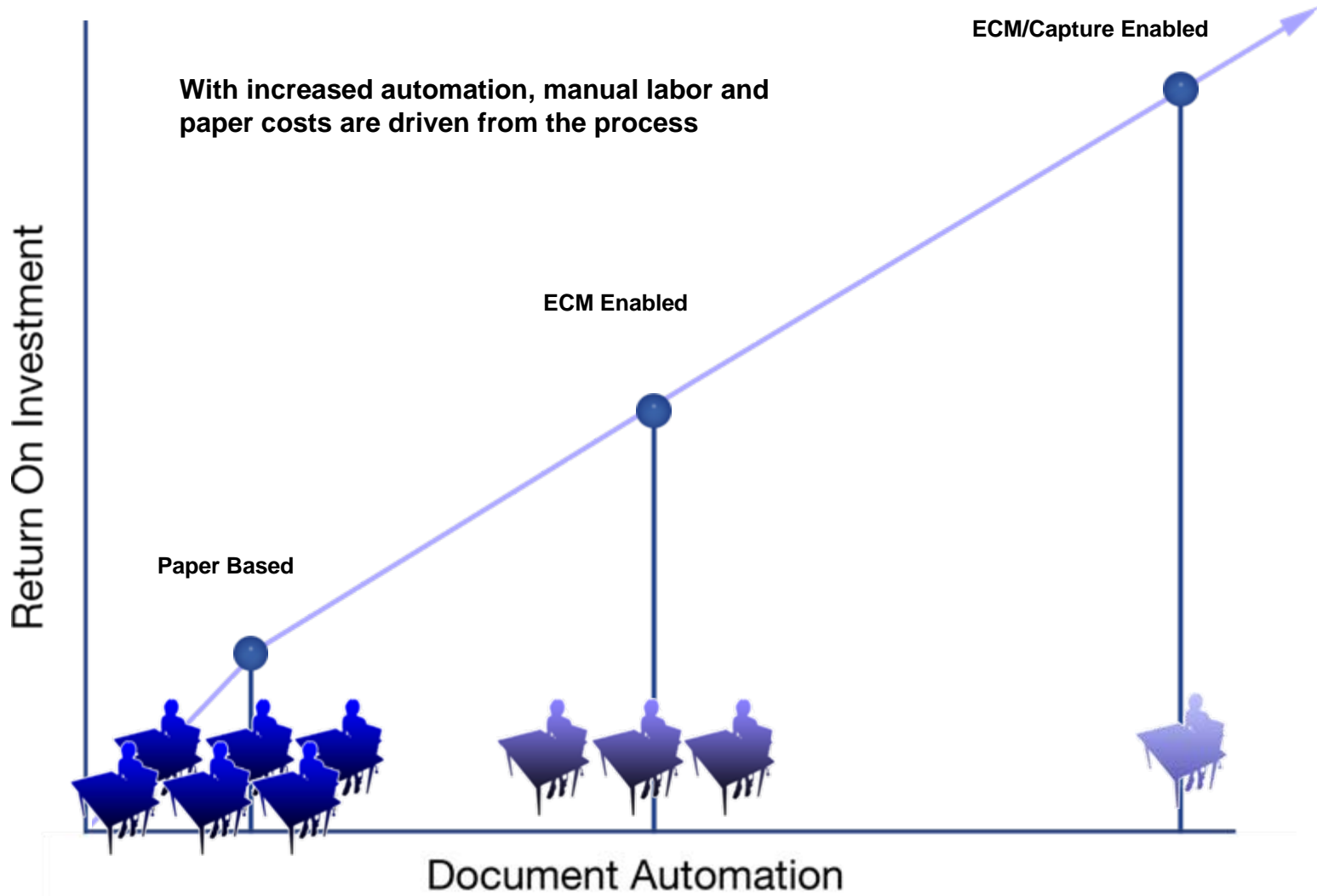- Software Demonstration

- Q & A

# Strategic Nature of Capture

- Capture applications are the gateway to enterprise content strategies

- Driven by several key value components:
  - FTE reduction / repurposing
  - Data entry error reduction
  - Document transportation costs
  - Document retention costs

- Growing document production (paper and electronic) and government regulation mean that Capture/ECM projects remain viable and justifiable even in uncertain economic times

# The benefits of document imaging & capture

- **Better customer/vendor service** and communications

- **Reduced time and resources** required to mana paper and related business processes

- **Improved cash flow**, reduced transaction and costs while growing the business

- **Improved collaboration** as documents can be immediately accessed and shared around the

- **Elimination of lost files**

- **Secure and reliable backup** and disaster recovery

- **And overall Return On Investment**

ECM/Capture Enabled

**With increased automation, manual labor and
paper costs are driven from the process**

ECM Enabled

Return On Investment

Paper Based

Document Automation

# What Do You Mean By Capture?

Basic Capture

Departmental Capture?

Enterprise Capture?

# Components of Enterprise Capture



**Mailroom**

**Department**

Central and Adhoc

ERP
ECM
BPM
BI

CAPTURE
COLLECT
PROCESS
TRANSFORM
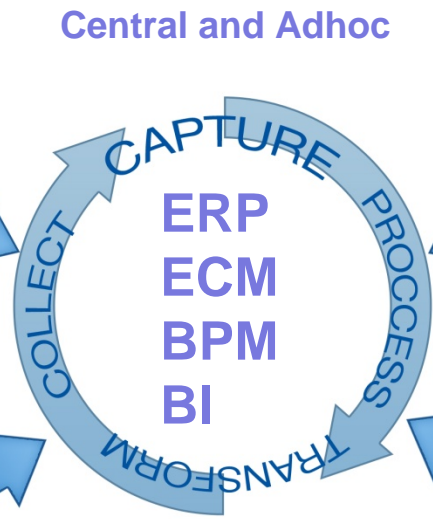
**Field**

**Branch**

Remote and Distributed

# Components of Enterprise Capture

**Mailroom**

**Department**

**Branch**

Document Types:

Records
Applications
Forms
Correspondence
Policies
Inventories
R&D documents
Tax documents
Regulatory
Surveys
Subscriptions
Invoices
Claims
Sales Orders
Purchase orders
Medical Records/EOBs
Sales and Service Applications
Human Resources
Inventories
Loan documents
Proofs of delivery

Capture Capabilities Required:
- High volume Scanning
- Automated Indexing
- Document ID and Classification
- Handprint capture (ICR)
- Machine print capture (OCR)
- Checkbox (OMR)
- Barcode
- Email input
- Fax input
- ERP integration
- Adjudication integration
- Thin client implementation
- Robust reporting

**Field**

# Datacap Capture Solutions

- Started in 1988 as early capture software developer

- First 100 ISVs on Microsoft Windows

- Headquartered in Tarrytown, NY

- Leadership by co-founders (CEO & CTO)

- Dedicated to developing document capture solutions

- First-mover technical innovation

- Focused on demanding capture

- IBM FileNet ISV Partner since 1994

- PartnerWorld member since 2004

- Acquired by IBM August 2010

# IBM DatacapTaskmaster Capture

## *The Enterprise Capture Platform*

# Key Industries / Applications

**Government**
- Tax Returns
- Property Taxes
- Motor Vehicles / Public Safety

**Transportation / Logistics**
- Commercial Invoices
- Customs Documents
- Brokers Orders

**Healthcare**
- EOBs
- Medical Records / EMR / EHR
- Healthcare Claims

**Corporate AP (Invoices)**
- Header Level Recognition
- Line Item Detail Extraction
- ECM / ERP Integration

**Distributed Scanning**
- Large # of satellite office
- Remote Scan, Process Centrally
- Improved Provisioning

**Financial Services & Insurance**
- Loan Documents
- Account Service Requests
- Applications & Enrollment

# IBM Datacap Taskmaster Capture 8.01

- Advanced capture capabilities for the network or the browser

- Production Document Capture
  - Central (corporate or mailroom-type)
  - Departmental
  - Web-based distributed deployments

- Empowers the end user to orchestrate their own capture systems. A point and click interface lets business users configure advanced solutions that can:
  - Input from scanners, MFDs, folders, Fax, email and electronic
  - Image enhancement to optimize recognition
  - Document ID and classification
  - Data extraction using OCR, ICR, OMR, barcode 1D and 2D technologies
  - Validates data including lookups (and retrievals)
  - Intuitive User Interface for data entry, edit and verification
    - Learns from human operator handling of exceptions
    - Thin and thick clients have same functionality

- Rich administration tools
  - Web-based monitoring and administration
  - Extensive Reporting

# Datacap Taskmaster Capture process
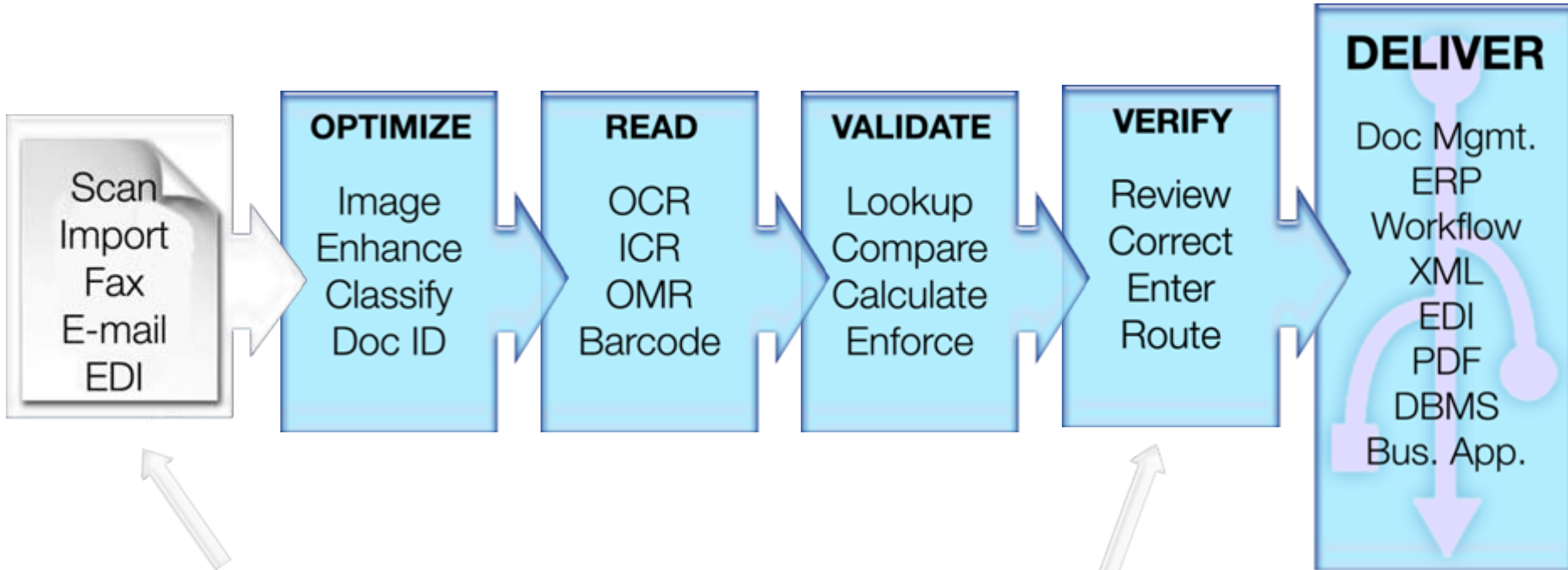


Taskmaster for Web

# Support for IBM ECM Repositories Standard

- **IBM FileNet Content Manager (P8)**
  - Tight handoff of data and images

- **IBM Content Manager (CM8)**
  - Uploads PDFs or TIFFs

- **IBM FileNet Image Services**
  - Uses IBM FileNet IDM Desktop Client

- **IBM Production Imaging Edition**
  - One product for the complete lifecycle of imaging from capture to repository to BPM to sophisticated viewer

  - Plus…

- **IBM FileNet Capture Professional**
  - Add automation and thin client distributed capture to existing IBM FileNet Capture installations

# Datacap Taskmaster Accounts Payable Capture

- Preconfigured for invoice data entry and P.O. matching

- Captures, verifies and routes invoice data without manual data entry

- Extract data including header and line item detail

- Learns new invoice types from operator

- Accurately captures all line items, even on multi-page invoices

- Validation rules on dates, math, lookups, data types

- Active verify panel enables operators to look up vendors, add line items, calculate missing values

- Aids three-way match with purchase order line item reconciliation

- Send to operator for handling exceptions
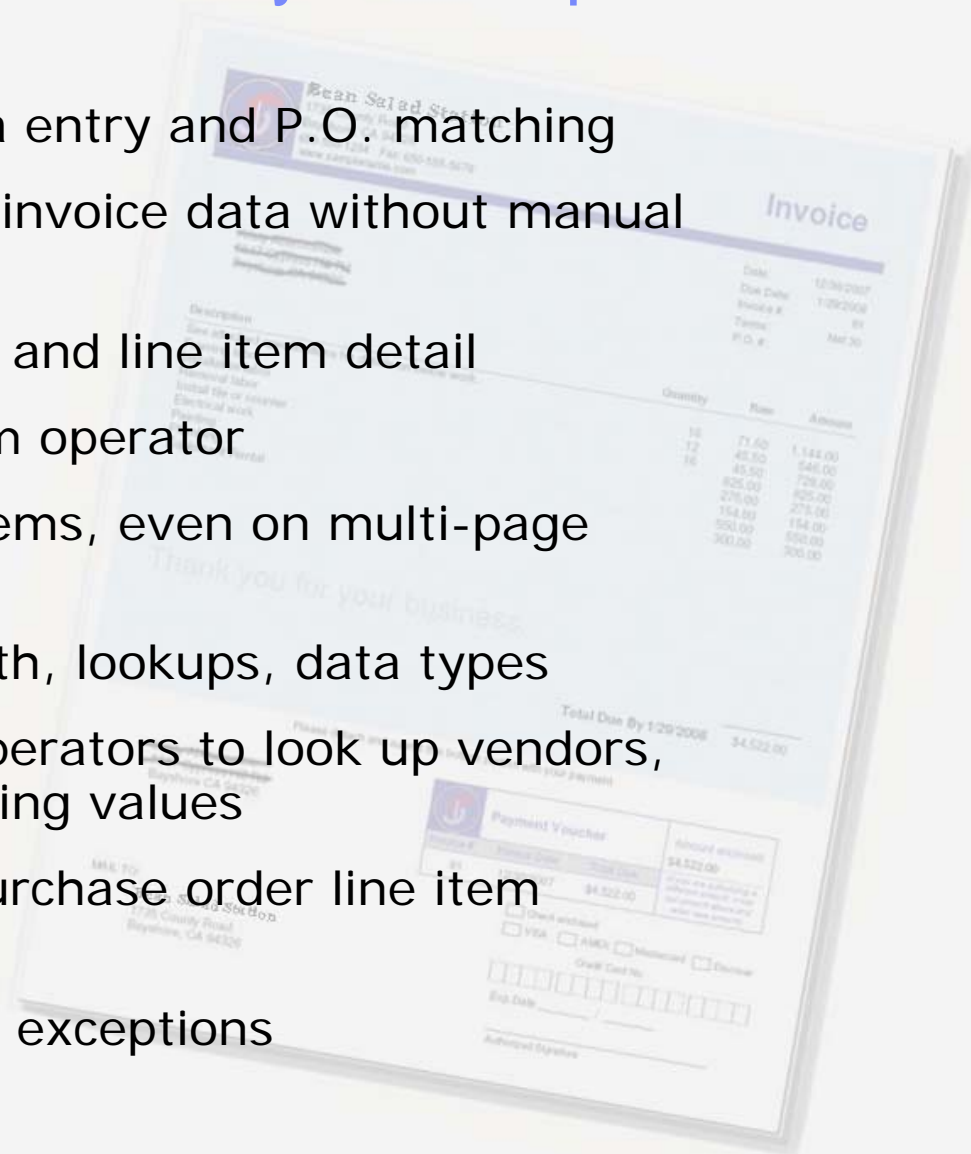
# Datacap Taskmaster Medical Claims Capture

- Capture CMS 1500 medical claims and UB-04 institutional claims
  - Preconfigured capture for 100% of fields on the CMS 1500 (aka "Professional")
  - Complete capture of all fields on the UB-04 claim (aka "Institutional")
  - Plus attachments

- Thin Web and thick Windows clients

- Support for black claims

- Validations
  - Lookups – i.e. Match diagnosis and CPT codes
  - Business rules
  - Math calculations
  - HIPAA compliant 837 EDI output

- Claim scanning, verification and application administration and reporting

# IBM Datacap Taskmaster Addon Components

- **IBM Datacap Rulerunner Enterprise - for increased performance**
  - Support for multi processor systems
  - Server-based Fingerprint processing

- **Connectors for eMail and Electronic Documents**
  - Access mail server(s) via Internet Message Access Protocol (IMAP), which is supported by IBM Lotus Domino, Microsoft Exchange Server, Novell GroupWise, and other mail servers
  - Provides ability to convert Microsoft Word, Excel, Outlook, PDF, and multipage TIFF files to single page TIFF files for capture processing
  - Extract from ZIP files

- **Connector for Fax**

- **Connectors:  EMC Documentum, Microsoft SharePoint and OpenText LiveLink**

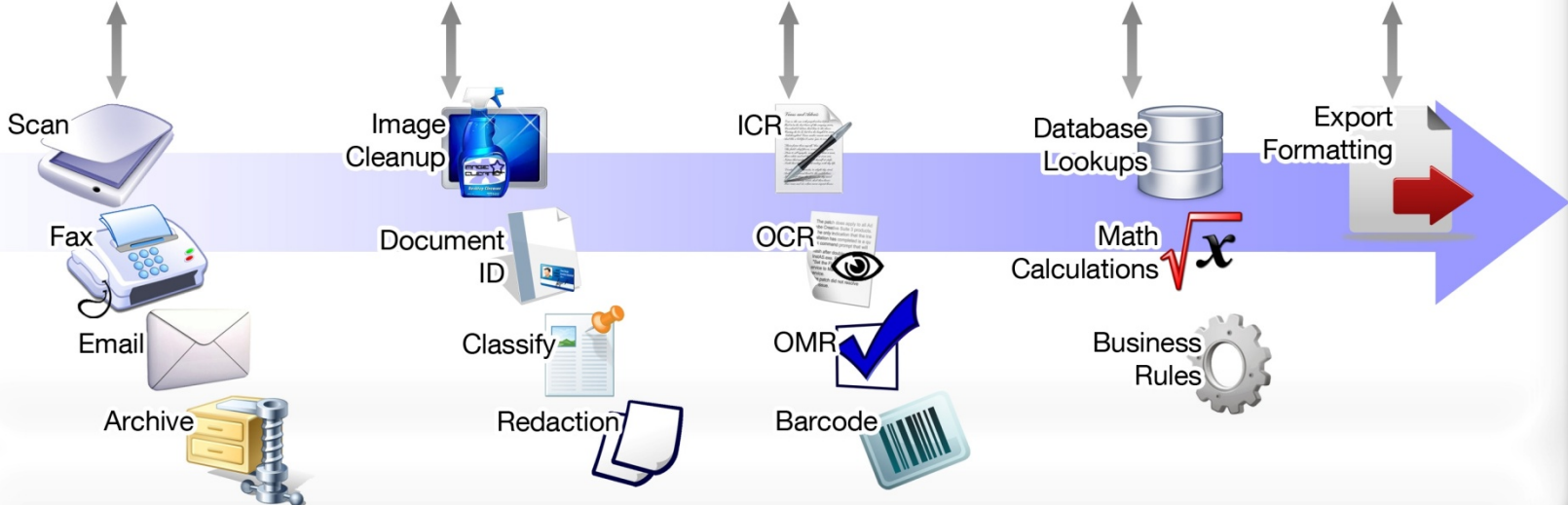- Recognition support for major European languages (single-byte, Latin 1-4 code pages)

# Problem: Traditional Capture Process is Inflexible

Accounts Payable · Claims Processing · Healthcare · Insurance · Government · Financial Services · Transportation · Manufacturing

Browser-Based Scan Panel · Thick Client Scan Panel · Browser-Based Verify Screen · Thick Client Verify Screen · Administrator Job Monitor
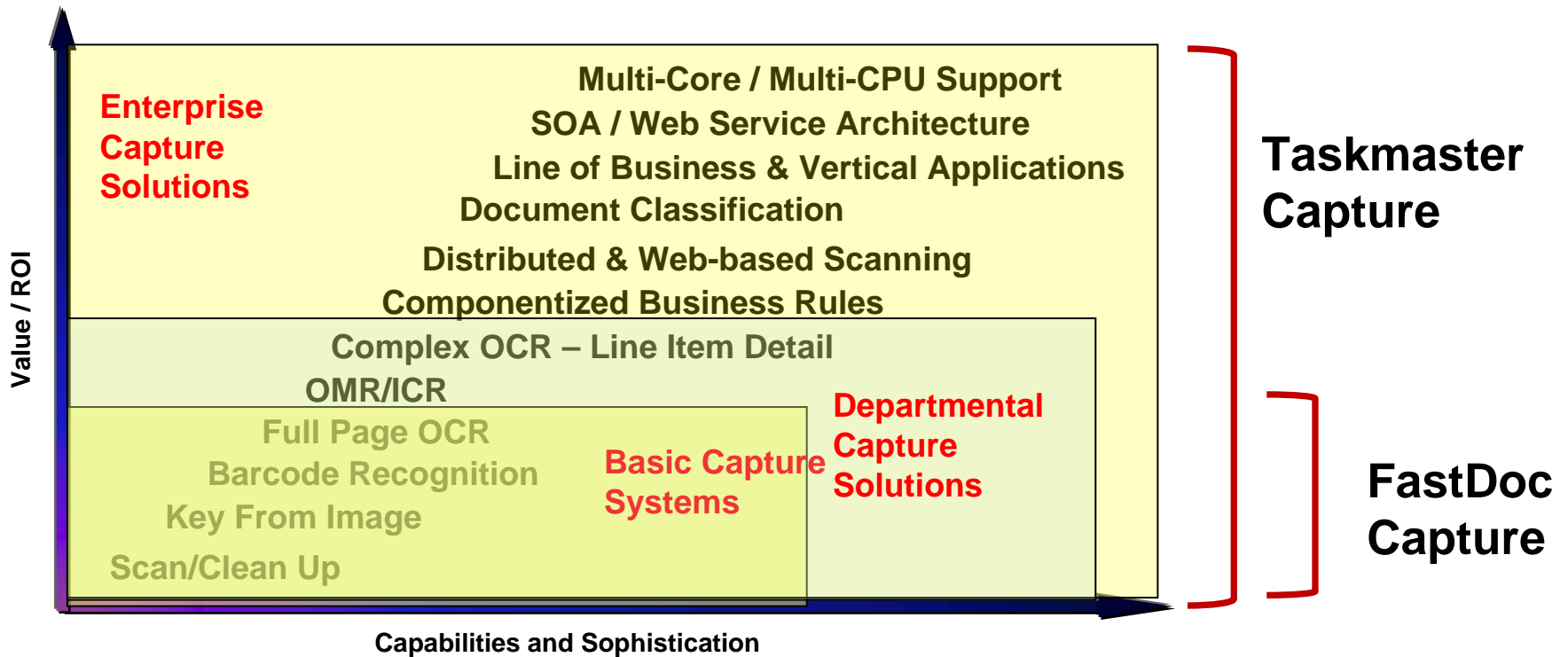
# Rulerunner Service

Scan · Image Cleanup · ICR · Database Lookups · Export Formatting

Fax · Document ID · OCR · Math Calculations

Email · Classify · OMR · Business Rules

Archive · Redaction · Barcode

# Capture Capabilities Scale to the Enterprise

**Value / ROI**

**Enterprise Capture Solutions**

**Multi-Core / Multi-CPU Support**
**SOA / Web Service Architecture**
**Line of Business & Vertical Applications**
**Document Classification**

**Distributed & Web-based Scanning**
**Componentized Business Rules**

**Complex OCR – Line Item Detail**
**OMR/ICR**

**Full Page OCR**
**Barcode Recognition**
**Key From Image**
**Scan/Clean Up**

**Basic Capture Systems**

**Departmental Capture Solutions**

**Taskmaster Capture**

**FastDoc Capture**
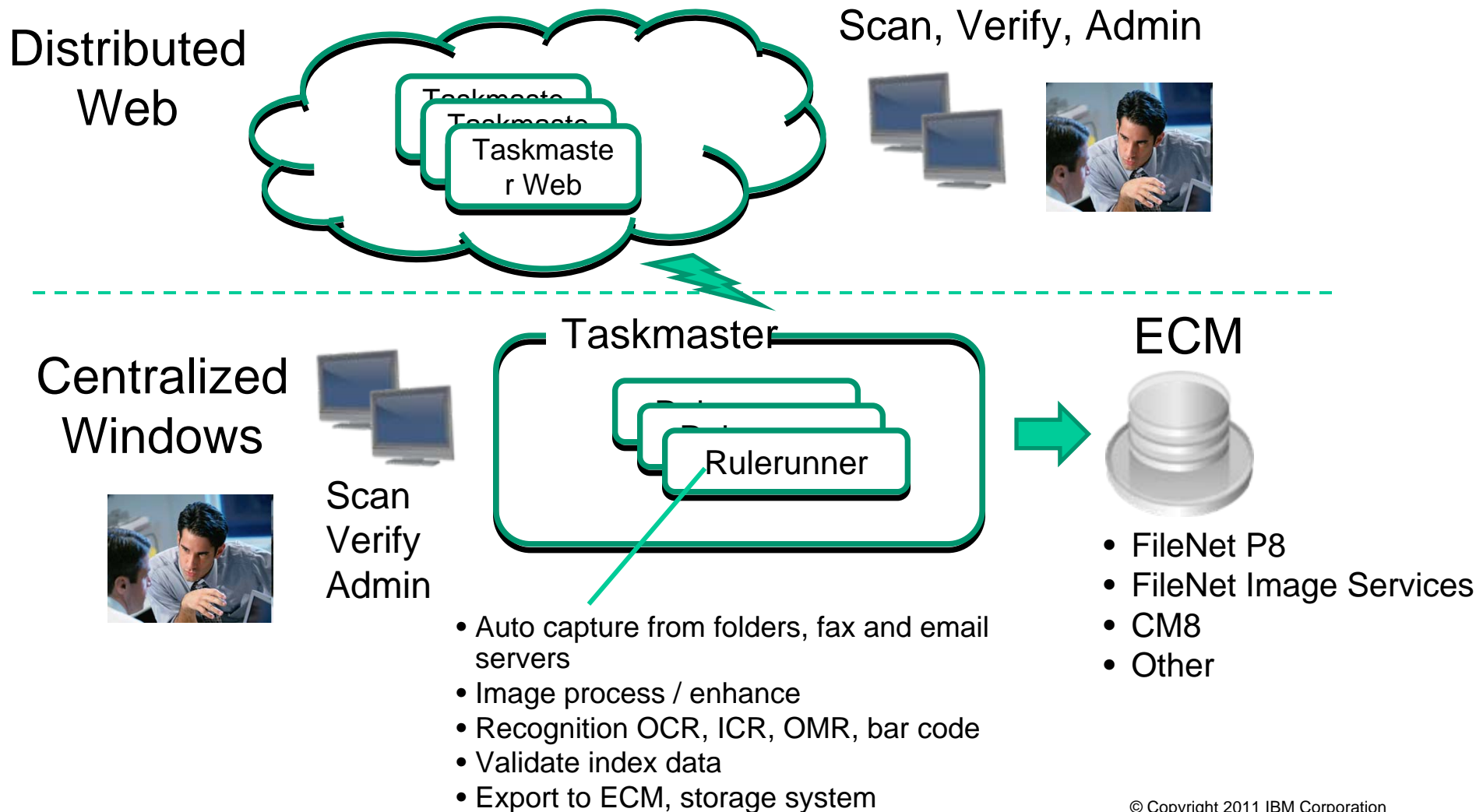
**Capabilities and Sophistication**

# Requirements & IBM Datacap Capabilities

| Requirement | IBM Datacap Capabilities |
|---|---|
| Scalable | Yes – Can process millions of pages/day |
| Capture multiple inputs | Yes – Paper, fax, electronic files, emails & attachments |
| Enterprise Capture | Yes – OCR, ICR, OMR & Barcode 1&2D, variable & structured forms |
| Thin & Thick Clients | Yes – Integrated |
| Auto Classification | Yes – Image & Content |
| Remote Capture | Yes – Web Client & MFD Support |
| SOA – Web Service | Yes – Rulerunner & Fingerprint Services |
| Security | Yes – AD / LDAP Support |
| Easily Installed (COTS) | Yes – Rules configuration vs. custom coding |
| Total Cost of Ownership | Lowest – License based on authorized user NOT image volume |

# Taskmaster Capture Demonstration

# IBM Datacap Taskmaster Capture Demonstration

**Distributed Web**

**Scan, Verify, Admin**

Taskmaster Web

**Centralized Windows**

**Taskmaster**

Scan
Verify
Admin

Rulerunner

**ECM**

- FileNet P8
- FileNet Image Services
- CM8
- Other

- Auto capture from folders, fax and email servers
- Image process / enhance
- Recognition OCR, ICR, OMR, bar code
- Validate index data
- Export to ECM, storage system

# IBM Datacap Taskmaster Demonstration

- Integrated distributed and centralized capture processing
    1. Remote scan
    2. Centralized Rulerunner processing
    3. Remote verification

- New invoice setup

# What Sets IBM Apart?

- **Rulerunner Service is IBM Datacap's Rules Execution Engine - none of our competitors offer this capability**
  - Implements in weeks not months
  - Quickly adapts to change
  - Call Rulerunner Service via SOA service from applications for in-process capture

- **Attractive, User-based Pricing**
  - Competitors charge per page which is excessively costly, inflexible and unpopular

- **Single product for both basic and advanced capture**
  - Scalable from a single client to thousands
  - Includes advanced data extraction and many capabilities that are expensive add-on modules in our competitor's products
  - Local and distributed
  - Thick and thin clients on a single platform

# Q & A