What's New in Datacap Taskmaster Capture?

Document capture lowers cost, accelerates process and helps *your* customers deepen their engagement with *their* customers

Your Presenters

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Agenda

- **What is Document Capture?**

- **The Value Proposition**

- **Datacap Taskmaster Capture**

- **Three tiers**

- **Common Applications**
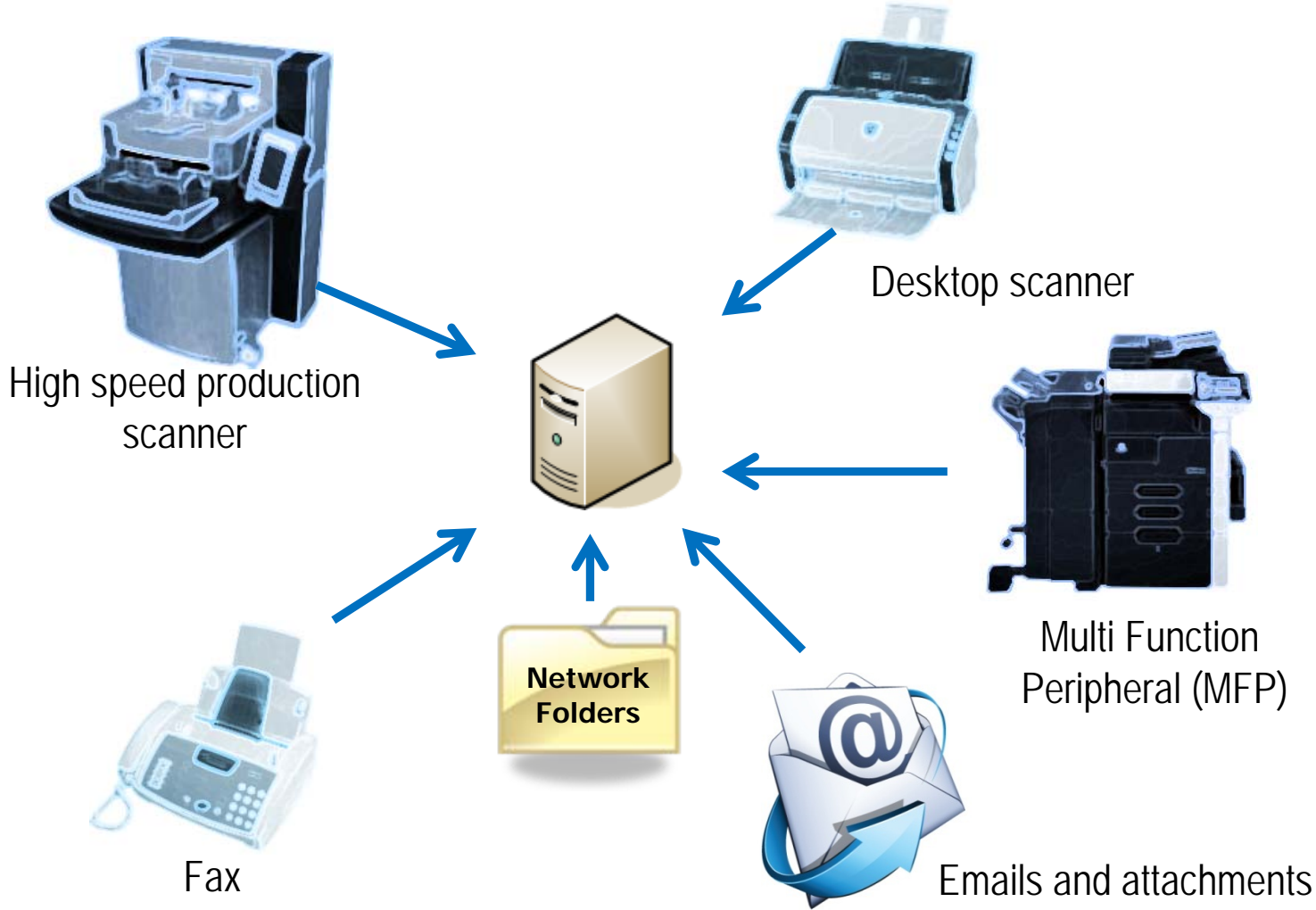
- **Unique features**

- **Demo**

- **Q & A**

How do you turn this...

…into this?

Transform Documents into Image

High speed production scanner

Desktop scanner

Multi Function Peripheral (MFP)

Network Folders

Fax

Emails and attachments

Vendor ID lookup

Vendor name

Invoice date

Invoice number

Total

Why Extract Data?

1. **Index the document image with searchable metadata for ECM**

   - Vendor name
   - invoice number
   - invoice date
   - SSN
   - Customer number
   - Provider ID

2. **Populate Business Systems with Key Data**

   - ERP
   - Accounting system
   - CRM
   - Workflow
   - Adjudication
   - Order processing
   - Business Intelligence

Manual Data Entry Time Spent Per Document

Average typing time in minutes

Document	Average typing time
Tax Returns	1 Min
Insurance Policies	1.1 Min
Loan Applications	1.4 Min
Insurance Claims	1.7 Min
Invoices	2 Min
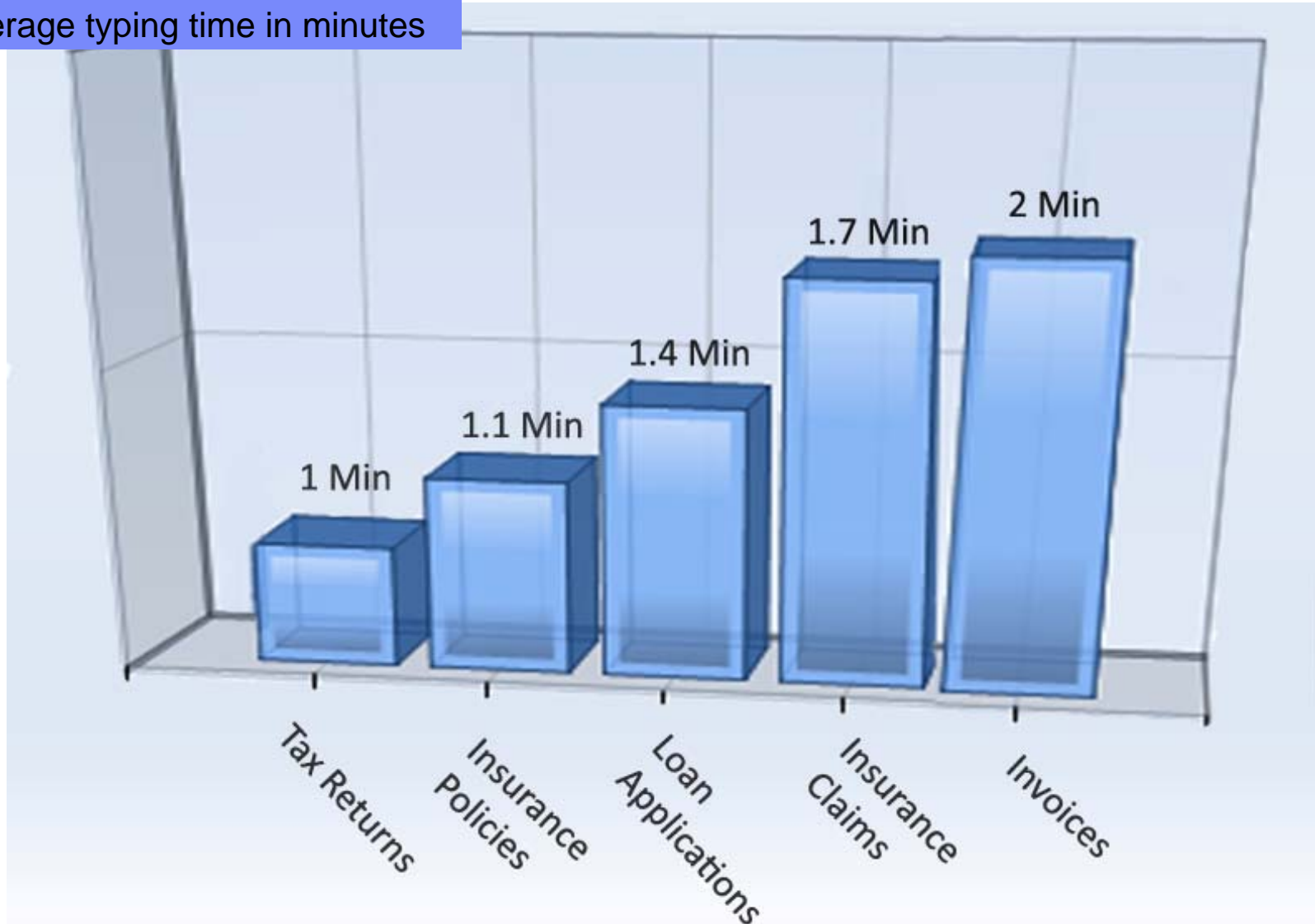
Paper Documents Shipped To Processing Center
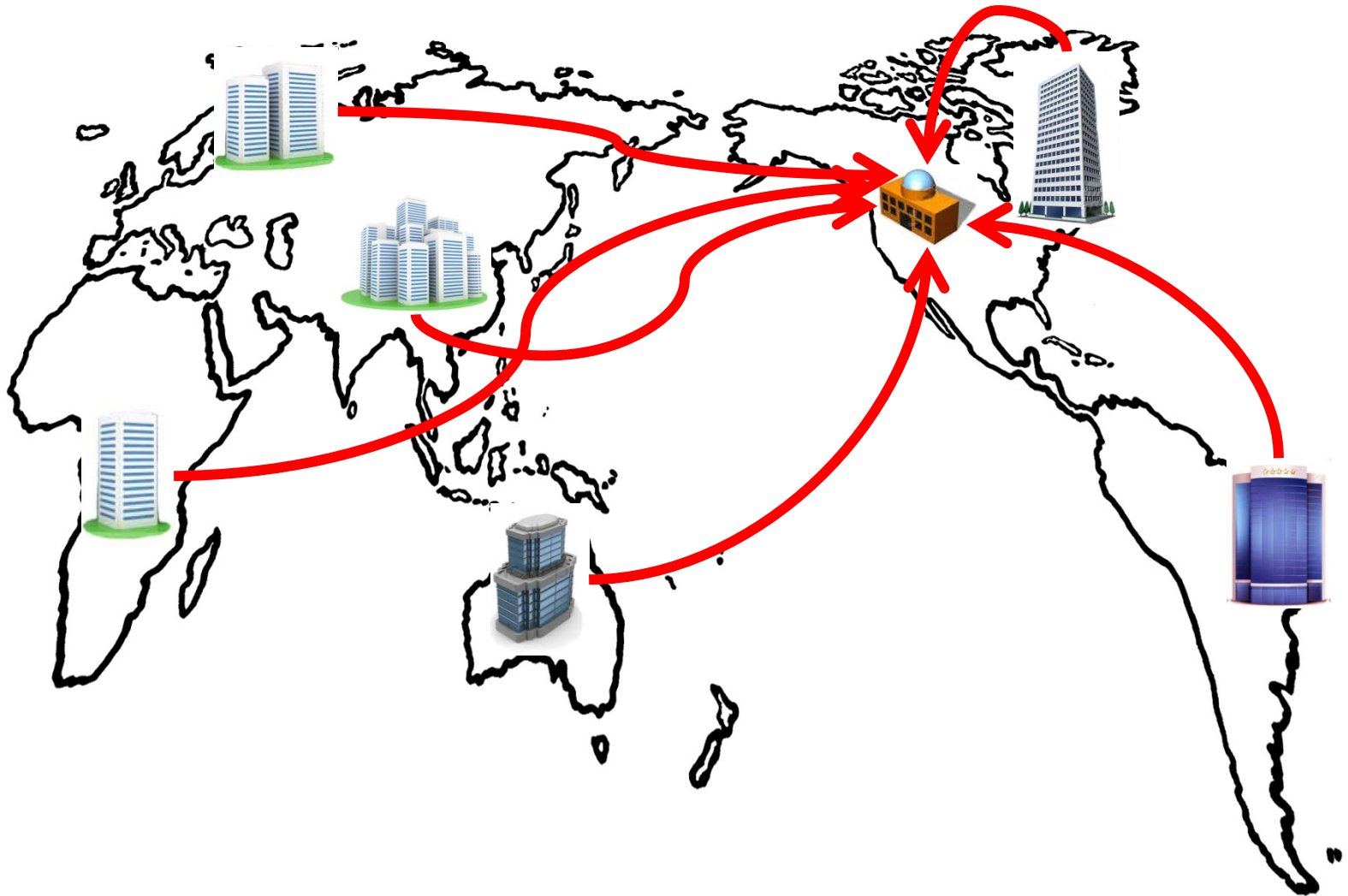
Capture In A Browser
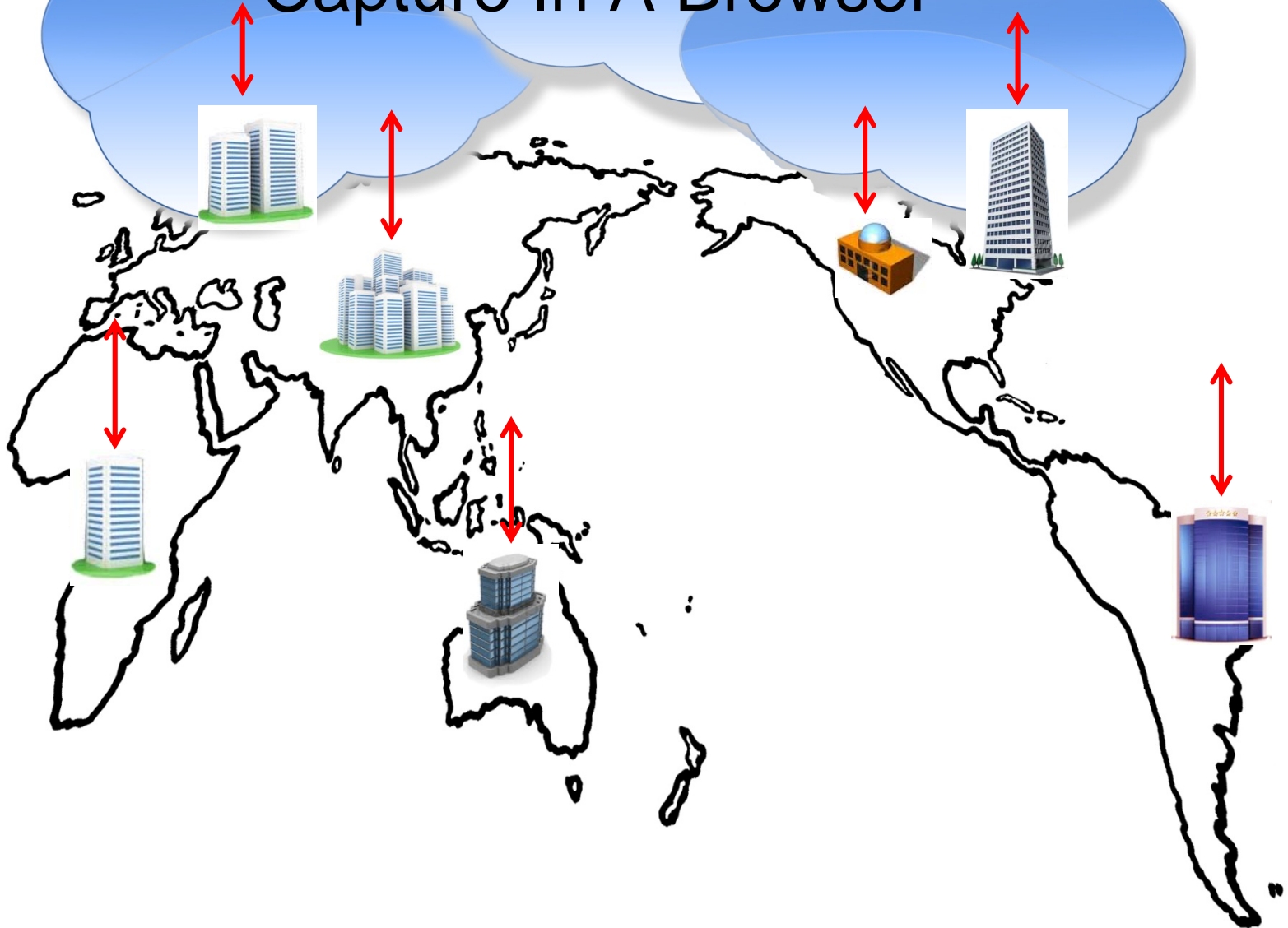
As Automation Increases, ROI Rises

Return On Investment

Document Automation
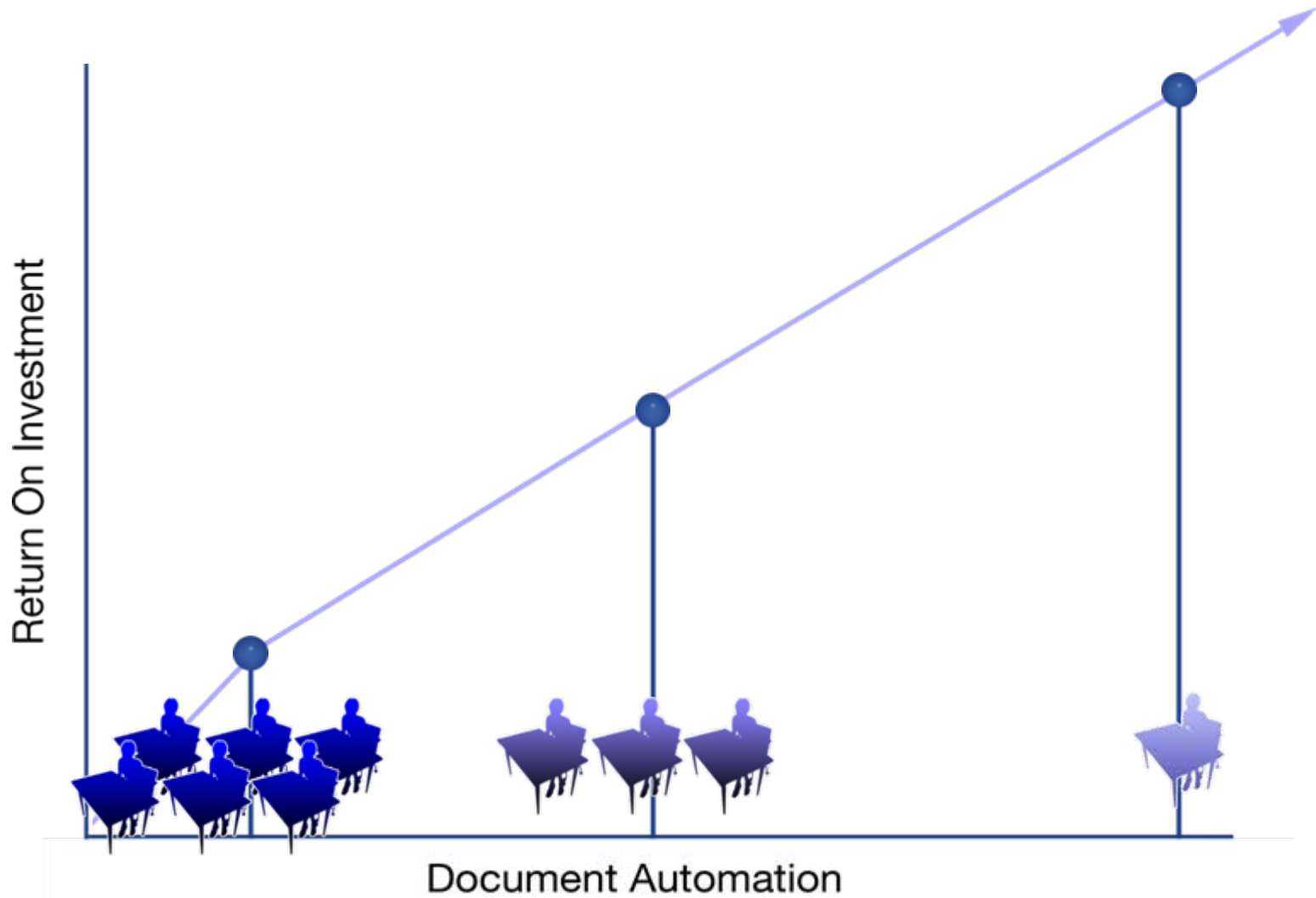
Smarter Capture
Datacap Taskmaster Capture

What's New In Datacap Taskmaster Capture?

New Features, New Solutions, New Pricing

- Three Pricing Models
  - Taskmaster Entry Level
  - Taskmaster Capture
  - Taskmaster Enterprise Edition
- Global language support (Pan-European, Cyrillic , Simplified Chinese)
- Rapid Application Deployment environment
- Enhanced security, scalability, stability
- SAP Integration with ICC4SAP and XFT
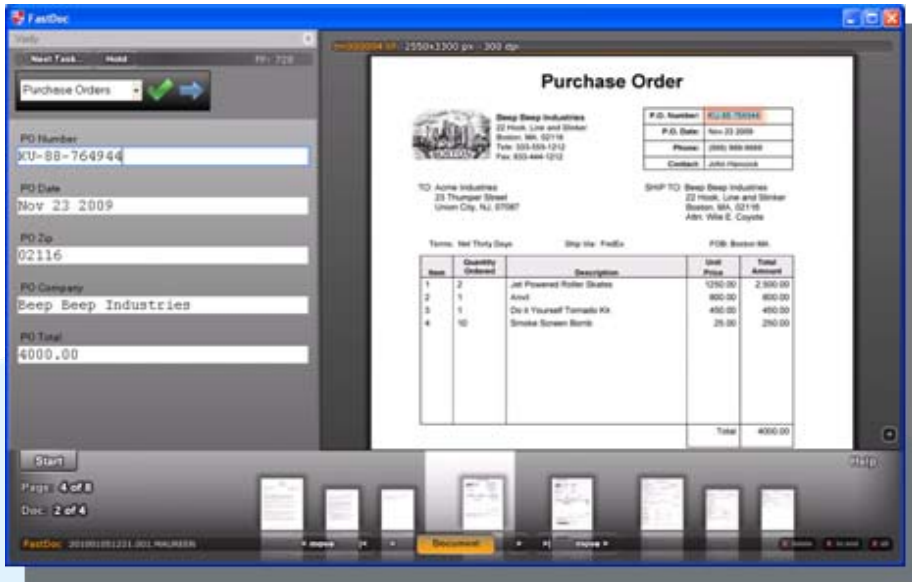
- **User Interface presents single, attractive panel for Scan and Verify**
- **Highly customizable, feature-rich environment**
- **Competitive offerings for both low and high ends of the market**

It's a Multi-Channel World

Aggregate All Documents for the Enterprise

It's a multi-channel world and documents arrive through many conduits

Set a single standard for all your incoming documents

Taskmaster is a capture portal

One solution to convert, "understand" and tag all incoming documents

Then direct them to the right systems, tools and people

Service
Scan
Fax
Email

Taskmaster

Govern
Activate
Analyze
Socialize

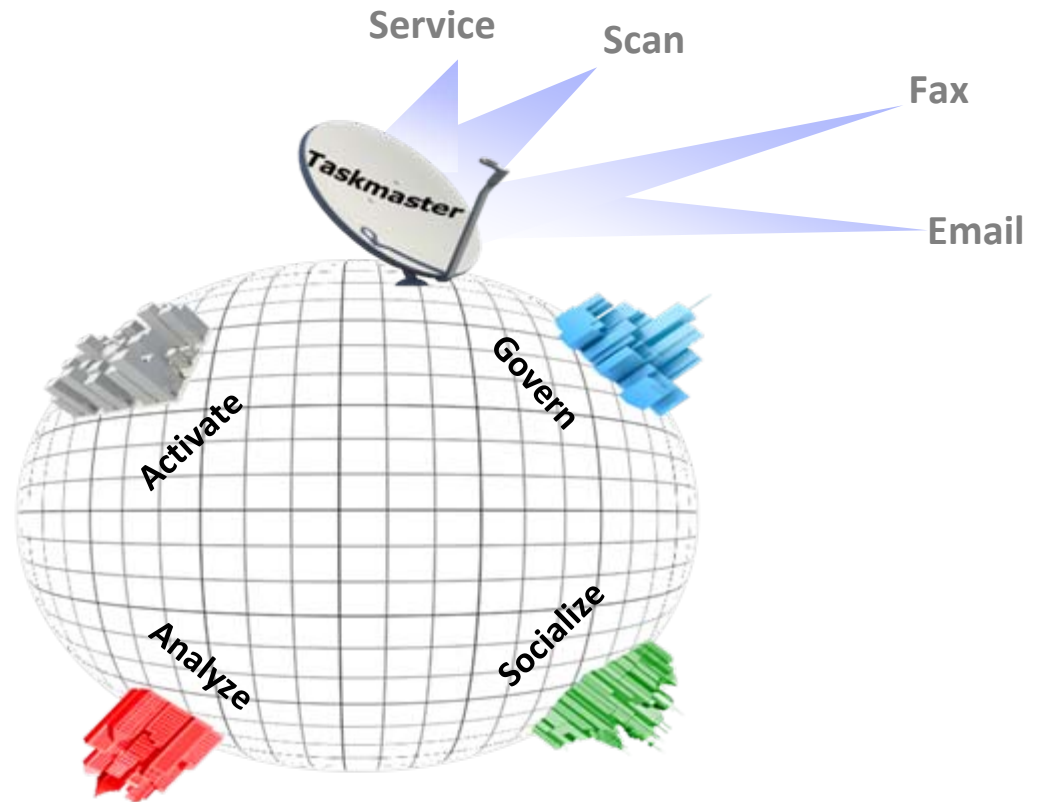# What Makes Datacap Taskmaster Smarter?

The Most Capture Intelligence In A Single Product

What Document Automation Does inside Taskmaster:

- **Convert:** Turn paper, fax, email, electronic attachments into images
- **Classify:** Understand the nature of the document and its role in the organization using content analytics and Watson technology
- **Extract:** handprint, typed text, handwriting, bar code, check box
- **Assure Quality Data:** database lookups, math calculations, P.O. matching
- **Protect:** Redact fields, split and rendezvous for privacy
- **Format:** Both image and data for all target systems – ECM, ERP, web, business systems, adjudication
- **And Do it in *Your Language*:** All European languages supported for UI and OCR recognition

Understand Your Documents

- Document type
- Data field location
- Retention schedule
- SSN, Customer/Vendor ID
- Date received
- Document number
- Business rules
- Exception Handling

Manual Approach	Smarter Approach
Print out and scan faxes, emails and attachments	Convert fax and electronic documents to image
Manual data entry	Automatically extract data from image
Manually compare name to existing table	Automatic database lookup and match
Manual Doc ID and sorting	Automatic document ID with analytics

Datacap Taskmaster Capture

Flexible licensing strategy

Enterprise Edition

Email and Electronic Documents Connector

Parascript FieldScript Connector

Fax Connector

Standard

- **Mixed thin and thick client**
- **Multiple recognition engines for OCR, ICR, barcode, checkbox**

Entry Level

- **Automated data validations**
- **Multiple output formats for ERP, web, business systems**
- **Global language support, Cyrillic and Simplified Chinese**

- **Zonal and full page OCR**
- **OMR checkbox and barcode**
- **Easy set-up for new documents**
- **Automatic document ID**
- **Intuitive user interface**
- **Automated validations**
- **Web-based administration**
- **Connections to IBM ECM**

Rulerunner Enterprise for High Volume Performance

IBM Content Classification

ECM Connectors – OpenText, EMC, Microsoft

Preconfigured LOB Capture Applications

Datacap Taskmaster Accounts Payable Capture

- Capture and verify invoice data without manual data entry
- Learns new invoice types on the fly
- Captures all line items, even on multi-page invoices
- Validation rules on dates, math, lookups, data types
- Aids three-way match with purchase order line item reconciliation

Datacap Taskmaster Medical Claim Capture

- Capture CMS 1500 medical claims and UB-04 institutional claims
  - Capture all fields
  - Plus attachments
- Support for black claims
- Healthcare Validations
- HIPAA-compliant 837 EDI output

| Datacap Taskmaster (Entry Level)		Datacap Taskmaster Capture		Datacap Taskmaster (Enterprise Edition)
Backfile conversion to reclaim storage space	Real time scanning anywhere anytime	Accounts Payable capture for supply chain	Tax form processing for govt. revenue	Mortgage capture to accelerate lending
Basic scan and imaging	Capture for SAP - HR and contract management	Medical claims capture for timely payments	Survey/Census processing for accurate data gathering	Capture for customs clearance
Capture for SharePoint* *with ECM Connector	Medical Records capture for better care	Capture for Subscription processing	New customer onboarding for fast service	Enterprise capture
Scan and archive for IBM Content Manager	Capture fax, email and attachment	Correspondence capture and tracking for compliance	Sales order entry for fast fulfillment	Custom applications

Datacap Capture Community Perception

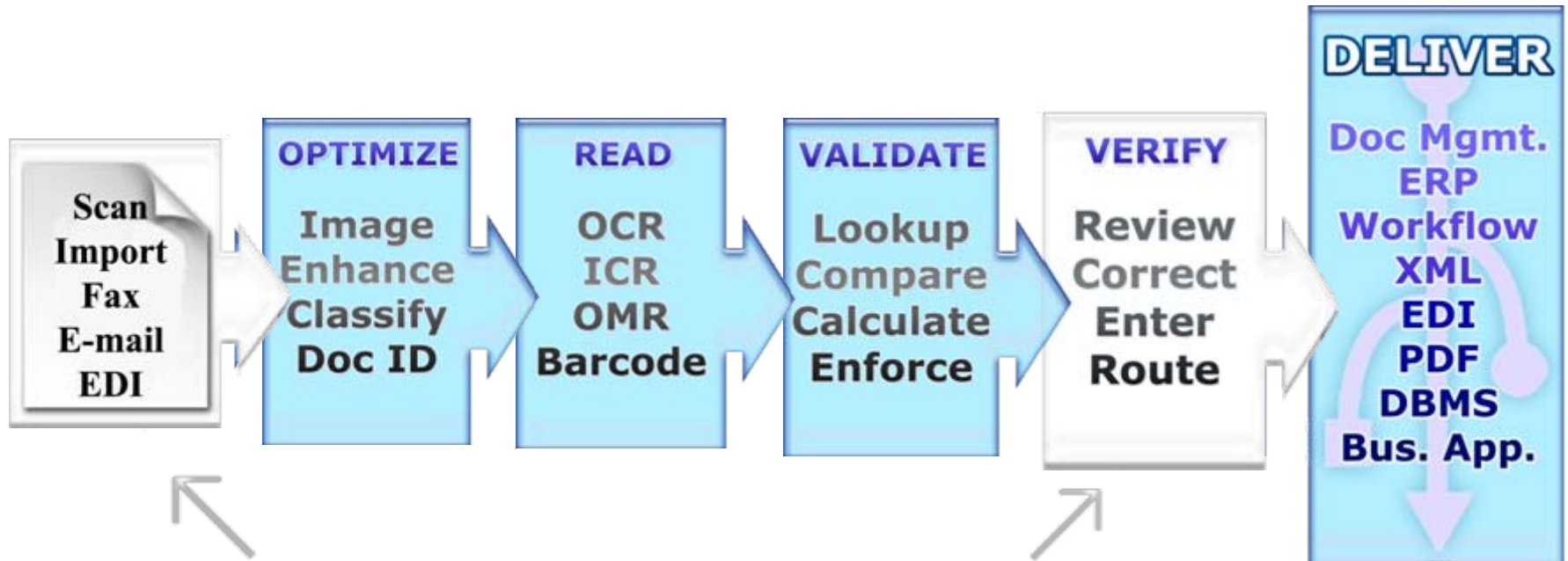|	AnyDoc Software OCR for AnyDoc	Autonomy Cardiff Teleform	Brainware Distiller	IBM FileNet ADR	IBM DataCap Taskmaster	Kofax Transformation Modules	ReadSoft FORMS	ReadSoft INVOICES	Top Image Systems eFLOW
Ease of Use					4.1				
Ease of Roll Out/Scalability					4				
Ease of Configuration/ Customization					4.2				
Security					4.3				
Strategy					4.7				
Stability/Bugs					4.2				
Integration					4.3				
Community and Channel					3.9				
Support/Maintenance					4.2				
Value for Money					4.3				
Standards					4.3				
Application Development					4.2				

In the 2011 AIIM Capture Software Product Study, no product scored higher than IBM Datacap Taskmaster Capture – well above Kofax and EMC Captiva

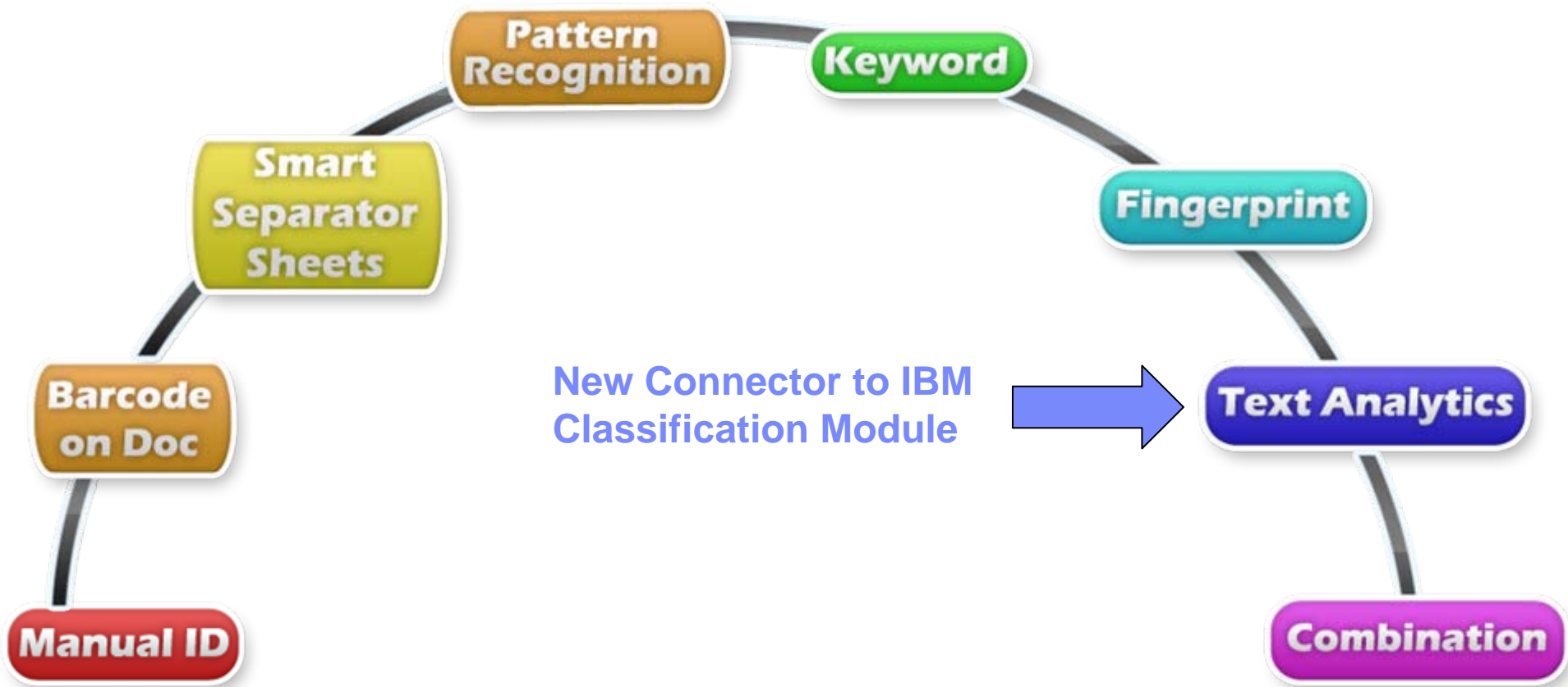# Taskmaster Architecture: Robust, Flexible, Scalable
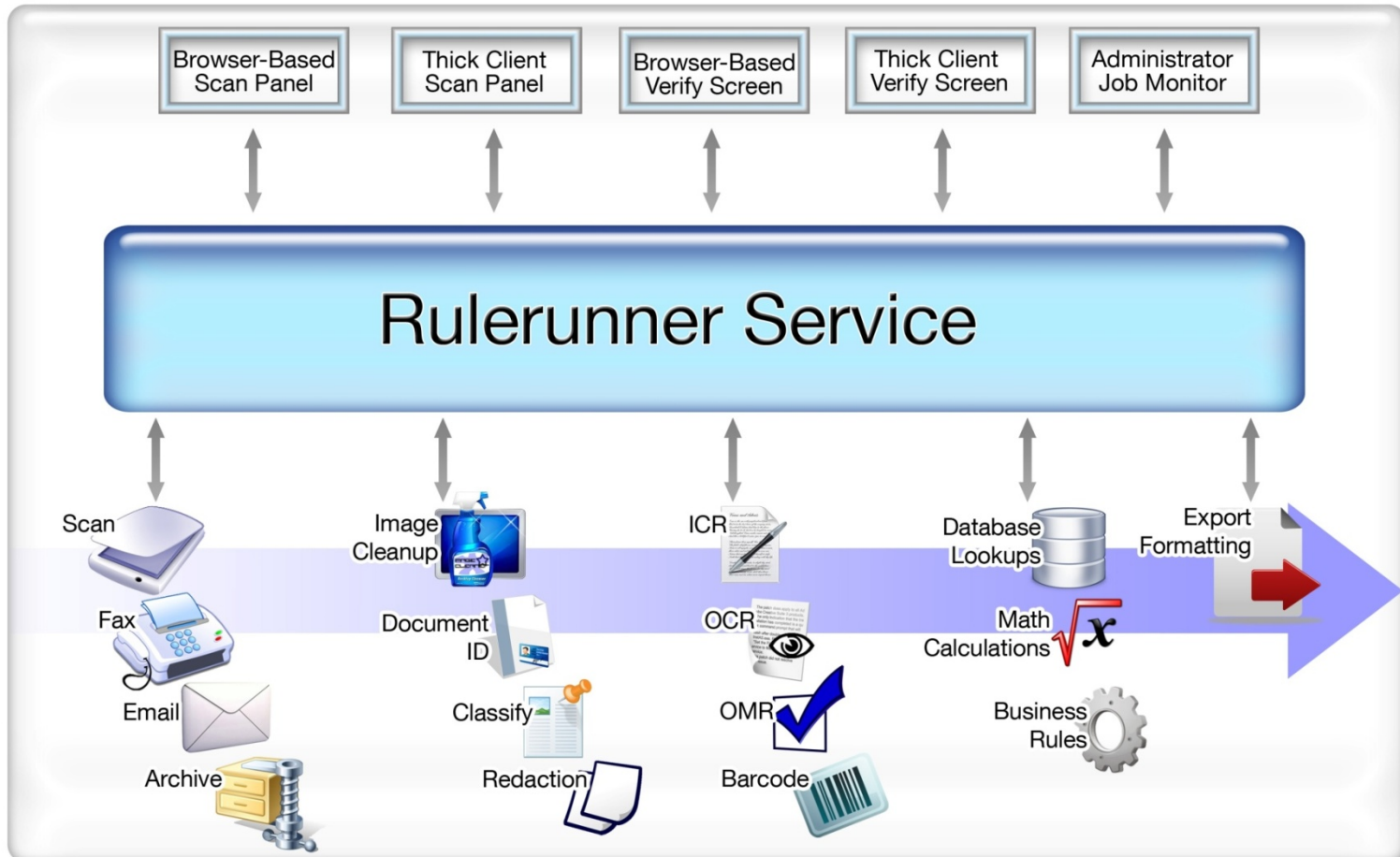
The Capture Process

Intelligence at every step of the way

Browser Based Capture

Taskmaster Capture Classification Spectrum

Pattern Recognition

Keyword

Smart Separator Sheets

Fingerprint

Barcode on Doc

New Connector to IBM Classification Module

Text Analytics

Manual ID

Combination

Demo

The Seven Secrets of Success for Capture Engagement

An Exclusive Luncheon and
Demonstration Event at IOD
for Capture and PIE users

Mandalay Bay, Las Vegas
Monday, October 22, 2012
12:30 - 2 PM
ECM Central

Sponsored by FUJITSU

Limited seating!
RSVP: deeptnag@in.ibm.com