

11 Nov. 11, 2010



Datacap Inc. Adding Robust Document Automation to IBM's ECM Portfolio



Today's Presenters

Reginald Twigg

- Global Offering Manager, Capture
- IBM

Tom Simalchik,

- Product Marketing Manager
- Datacap

David Jenness

- Marketing Manager
- Datacap

Document Capture is a critical entry point for a customer's Enterprise Content Management strategy to optimize business processes and reduce costs

▪ High Volume Document Capture and Imaging

- Driving Process Optimization
- Organizations with large quantities of paper-based transactions need to digitize the transactions to support applications such as: Accounts Payable Invoices, Loan Origination and Servicing, Account Opening, Insurance Claims, Government Tax, Socials Benefits, & Licenses.

▪ Advanced Case Management

- Make effective decisions and optimize case outcomes
- In-process-capture integrates unstructured content in mission critical business processes and enabling analytics to uncover key business insights for better decision making

▪ Information Lifecycle Governance

- Trusted content reduces legal risk and governance costs
- Datacap Captures and extracts meaning from unstructured information at the source to protect the chain of custody of critical business documents.

▪ Green Initiatives

- Paperless technology reduces costs and improves efficiencies by reducing physical storage, transportation, and paper consumption.

▪ Platform Standardization

- Across the enterprise, customers seek a consistent set of document capture technologies integrated with their ECM stack across all lines of business.

▪ Rapid Return on Investment

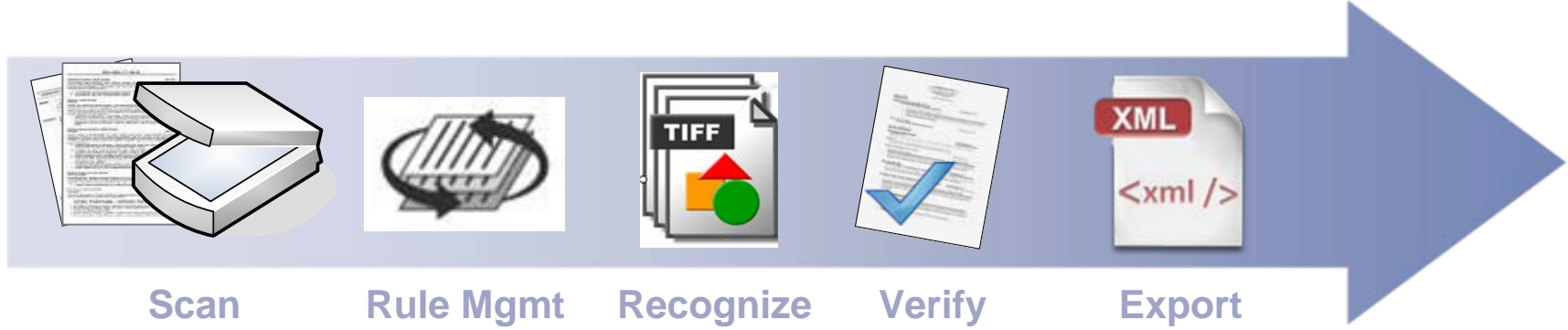
- Automating capture processes takes on ECM's highest ongoing cost - labor associated with processing and transporting paper documents - easily-identifiable justification for the customer's investment.



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

Strengthening IBM's Production Imaging & Case Management Leadership



Datacap Capture

- **Best-of-breed technology for Capture Automation**
 - Batch, Distributed & in-Process Capture
 - High-performance data extraction
 - Open SOA-based procedural rule management
- **Industry Solutions for Capture Automation**
 - Accounts Payable, Explanation of Benefits, Tax, ..
- **Cross ECM Portfolio and beyond ..**
 - IBM Content Manager (CM8)
 - FileNet CM, BPM & RM, Panagon Image Services
 - Non-IBM:- including EMC, Open Text, Microsoft SharePoint, Hyland

Why IBM for Capture Automation

- **Single vendor for Capture, Imaging, Case Management & ECM**
- **Strengthening Capture & Production Imaging Leadership**
 - Refocus on customers, track record and market share in Imaging & Capture
- **First mover in Case Management**
 - Extending Capture & Imaging with Case Management capabilities
- **Completeness of ECM offering:**
 - Collection, Classification, RM, Archive, eDiscovery, BPM, Case Management, Enterprise Search & Analytics

About Datacap

- 22 years as ISV
- 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

Awards

- ***Computerworld Smithsonian Award for Innovations that Benefit Society***
 - Massachusetts Department of Revenue
- ***Kinetic Information Process Innovation Awards***
 - American College of Physicians
 - Hallmark Inc.
- ***FileNet Innovation Award***
 - Nationwide Insurance
 - Taskmaster Components Running inside FileNet Capture
- ***AIIM Best Of Show***
 - Taskmaster 7 - Forms Processing Category





Taskmaster

Document Capture For A Demanding World

Taskmaster

- **Taskmaster** – Two-tier, client-server document automation platform driven by an advanced rules-driven architecture
- **Taskmaster Web** – Browser-based scanning, verification and administration – makes Taskmaster three-tier
- **Vertical Applications**
 - *Taskmaster APT* for invoice capture
 - *Taskmaster for Medical Claims*
 - *Taskmaster for EOBs*
- **Options**
 - **OCR/ICR/OMR/Bar Code** - Best of breed recognition engines
 - **Fax/email input** – Capture of electronic documents
 - **eDoc Conversion** – Convert office documents to single page TIFF files for processing by Taskmaster
 - **Wordfire Classify** – Automated document classification with text analytics
 - **Rulerunner Quattro/Fingerprint Service** – High performance options speed document processing
 - **Release actions** – FileNet, Content Manager and non-IBM repositories
 - **Redaction** and many more

Key Industries / Applications

Government

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

Transportation / Logistics

- Commercial Invoices
- Customs Documents
- Brokers Orders

Healthcare

- Medical Claims
- Medical Records / EMR / EHR
- Patient Registration

Corporate AP (Invoices)

- Header Level Recognition
- Line Item Detail Extraction
- ECM / ERP Integration

Distributed Scanning

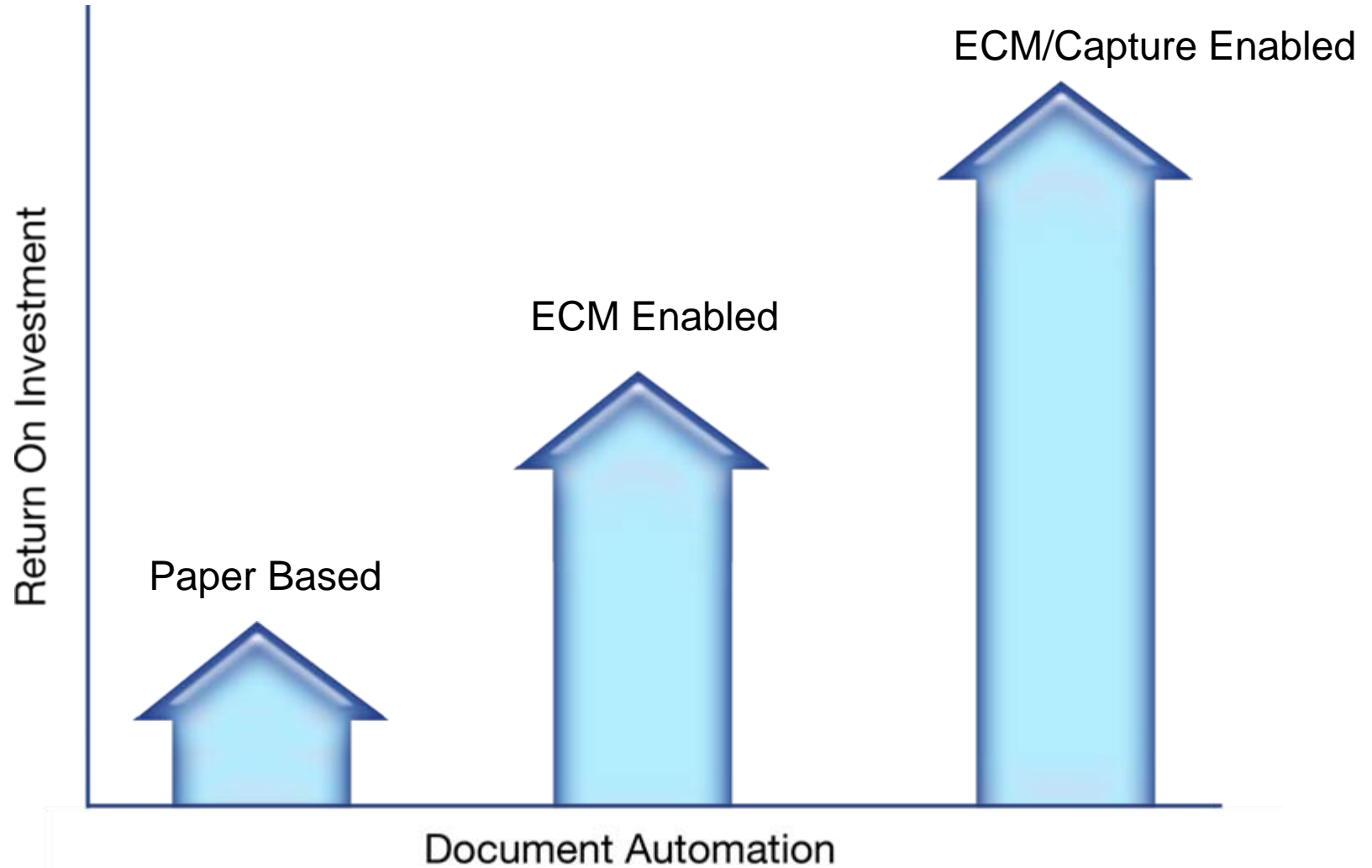
- Large # of satellite office
- Remote Scan, Process Centrally
- Improved Provisioning

Financial Services

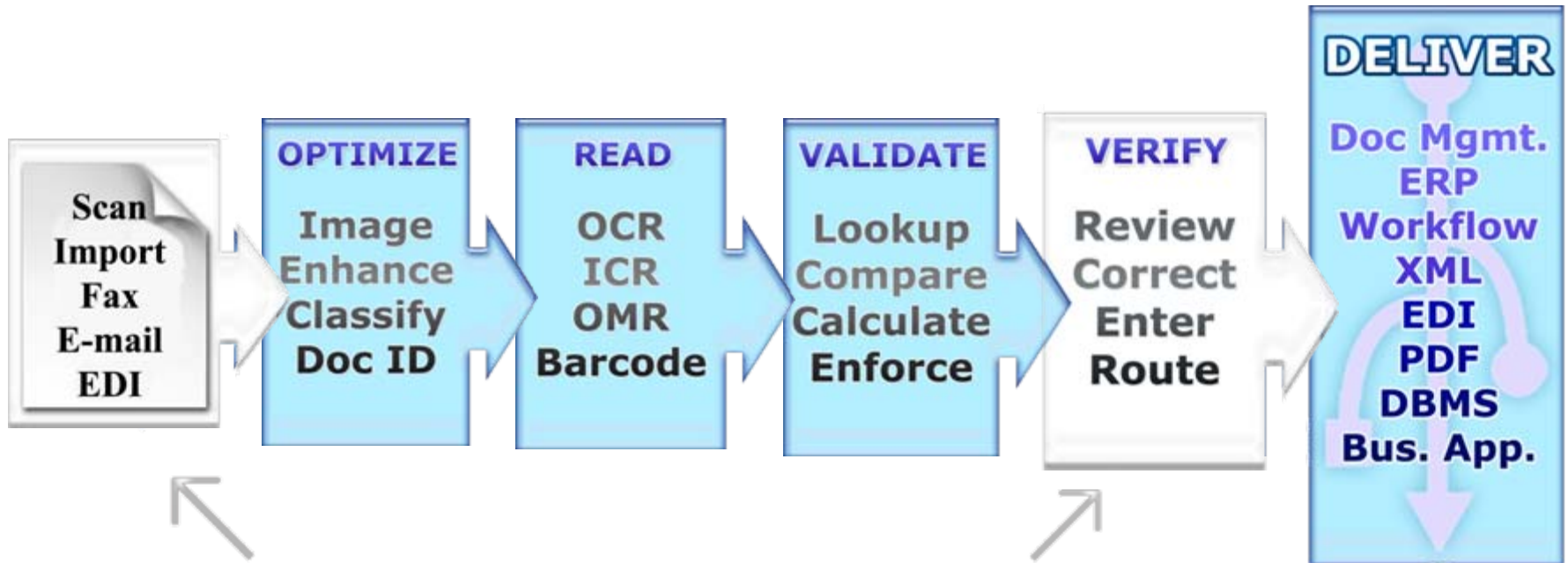
- Mortgage Documents
- Proxy Statements
- Applications

Current Taskmaster Integrations With IBM

- **Datacap has release actions for IBM CM8**
 - Tight integration of images and data
 - Proven applications for Insurance and Government
- **Many Installations with FileNet**
 - Insurance
 - Government
 - Publishing
 - Financial
 - Healthcare
- **Taskmaster Components for FileNet Capture**
 - Insurance
 - Government
- **Capture for iSeries**
 - Retail
 - Accounts Payable
 - Insurance



Taskmaster Process – Combines Thin and Thick Client



Taskmaster Web

Distributed Capture Advantages

- Rapid ROI
 - Dramatic reduction in document shipping costs
 - Faster turnaround
 - Reduced hardware & support costs
 - Leverage existing MFDs
 - No software installed on client
- “Virtual Capture”
 - Documents can be scanned in one location and verified at any location
 - Administration from any location
- Competitive Points
 - Replacement - Existing distributed systems are very hardware dependent
 - Datacap is more advanced
 - Scan, Verify & Administration
 - Advanced UI – Advanced OCR Correction & Fingerprint Creation
 - Reduced bandwidth – Single Pass Verify
 - Licensing Model – Concurrent User
- Help drive Advanced Case Management!
 - Capture close to the source

Demonstration Taskmaster Distributed Capture

Tom Simalchik

Datacap Product Marketing Manager

- Taskmaster APT for invoice capture
 - Distributed scanning
 - Centralized document processing
 - Distributed and centralized document verification
 - Distributed and centralized administration
 - Extensive data validations, database lookups and retrievals

Q & A