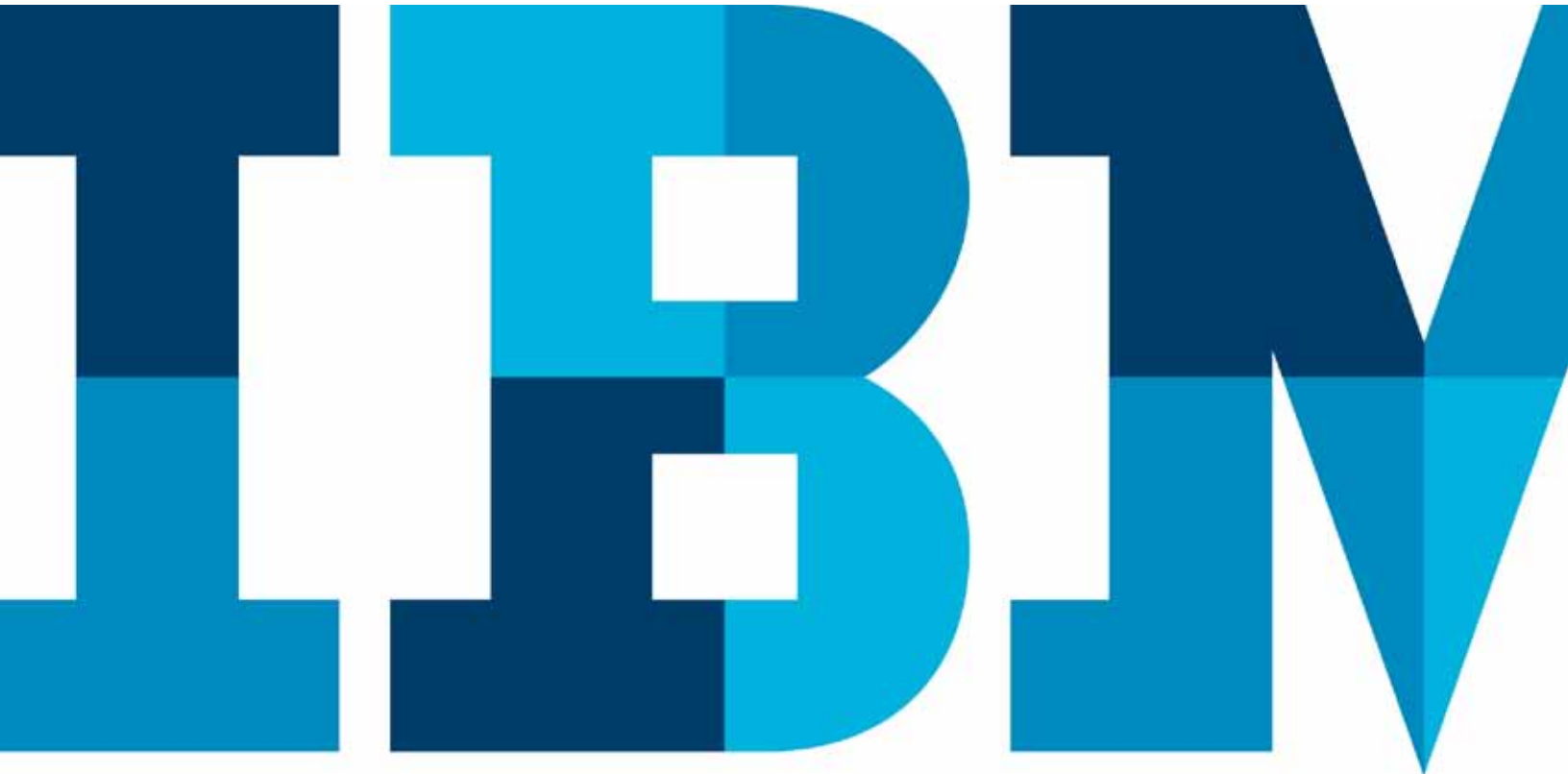# Datacap Taskmaster Capture

The enterprise capture platform

IBM

Meet the document challenge with automated capture

According to the Association of Information and Image Management (AIIM), paper and electronic documents are continuing to flow into businesses of all sizes at ever-growing volumes. For large Fortune 1000 businesses with multiple offices, capturing, transforming and distributing paper documents can be a constant and expensive endeavor. IBM Datacap Taskmaster Capture can help automate this process for the enterprise, turning paper documents into electronic files that can be indexed, verified and saved with minimal user intervention.

Choose Datacap Taskmaster Capture for the following tasks:

- Document scanning and capture
- Automated indexing
- Data extraction for forms processing
- Distributed browser-based capture
- Optical character recognition (OCR), intelligent character recognition (ICR), optical mark recognition (OMR), barcode
- Structured and unstructured documents
- Document identification and classification

Datacap Taskmaster Capture was designed for enterprise-wide deployments in paper-intensive market segments, such as government, insurance, healthcare, financial services and transportation, to name a few.

Datacap Taskmaster Capture is one of the industry's most flexible three-tier client server capture platforms. Driven by a highly configurable procedural rules engine, it combines advanced capture functionality with superior flexibility. Clients use Datacap Taskmaster Capture to mix thin client and thick client implementations to create highly scalable, distributed capture applications with multiple types of recognition, document identification and automated validations.

Datacap Taskmaster Capture's rules engine, known as Rulerunner Service, drives virtually all document capture processing functions, including scanning, document ID, image enhancement, recognition and export formatting. Competitive capture systems may use the term "rules," but they usually refer to only enforcing business rules. Datacap Taskmaster Capture rules are discrete executable functions, built from code snippets, known as actions. There are hundreds of pre-built actions in the actions library, which can be easily assembled by non-programmers in Datacap Studio, a point-and-click interface for configuring and testing rules. Since Datacap rules take advantage of industry standards, such as VBScript and .NET, they are reusable and modifiable and deliver a high degree of flexibility when configuring a capture application.

"Datacap Taskmaster Capture enables us to scan and capture critical customer information and quickly process our subscription orders. By improving our reporting turnaround time, marketing decisions are now made in a more timely manner."

—Brian Gilmore, national manager of circulation service operations for Dow Jones Fulfillment Services

Datacap Taskmaster Capture architecture: robust, flexible, scalable
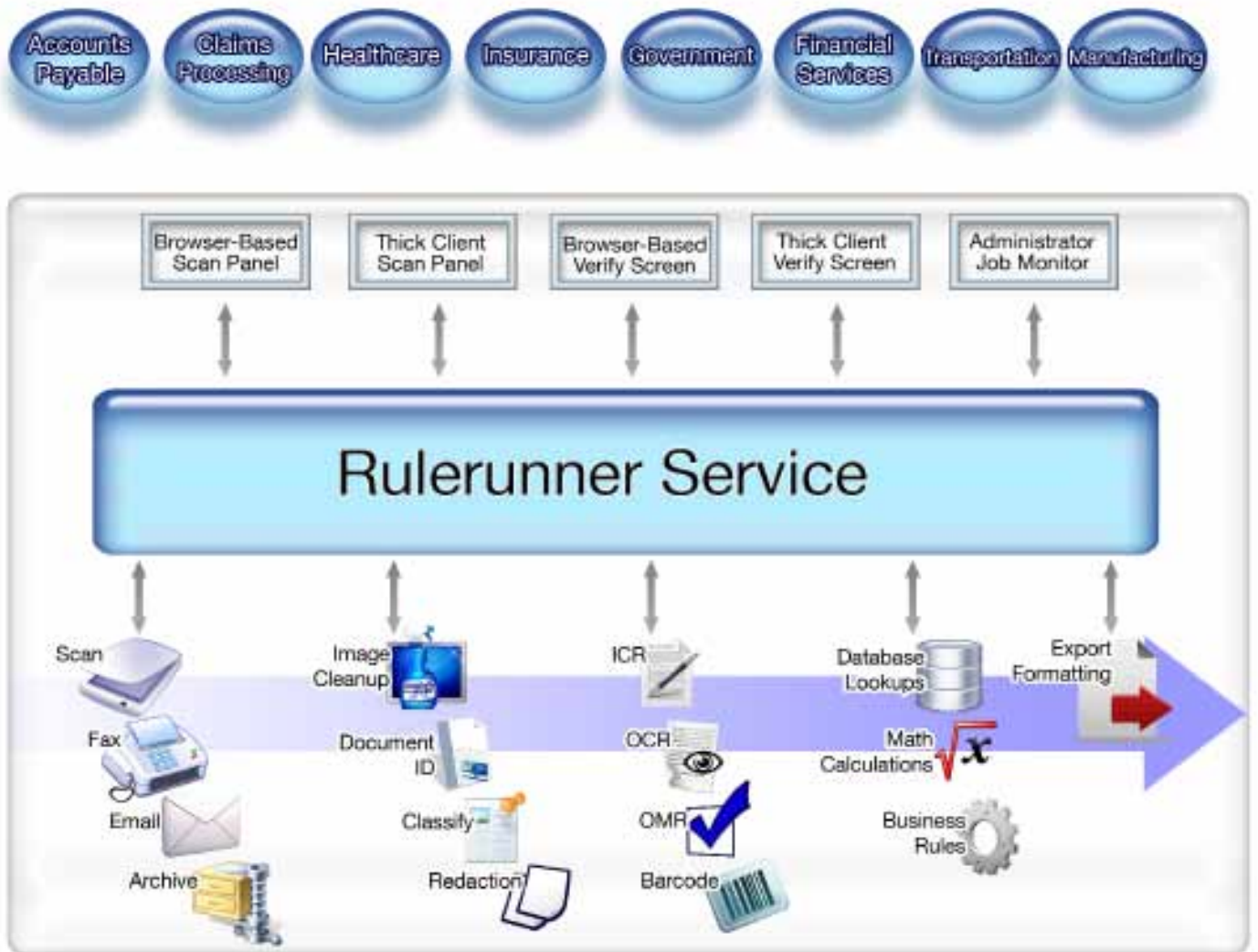

Figure 1: Paper-intensive industries leverage Datacap Taskmaster Capture's thick client and thin client interfaces to manage the capture process. Rulerunner Service drives all background processing, from scanning through image enhancement to recognition and delivery to target systems.

Benefits

Increased productivity: By significantly reducing manual data entry and paper-based storage and retrieval of documents, knowledge workers can more quickly process and access documents for customer service, case management, business transactions and compliance.

Streamlined process: Datacap Taskmaster Capture can help eliminate a cumbersome paper process by enabling clients to automate previously labor-intensive aspects.

Reduced cost: Datacap Taskmaster Capture is designed to reduce the required data entry personnel by 50 percent and sometimes more. Distributed scanning and verification enables clients to reduce or eliminate document shipping costs and distribute labor to areas with more affordable labor rates.

Increased accuracy: By eliminating the errors that tired or distracted human data entry operators historically make, Datacap Taskmaster Capture can save time tracking down and fixing faulty data or misplaced document images.

Flexible rules processing: The procedural rules engine that powers Datacap Taskmaster Capture uses .NET and VBScript standards which enable clients to create advanced capture applications, with custom panels and features that address their specific business objectives.
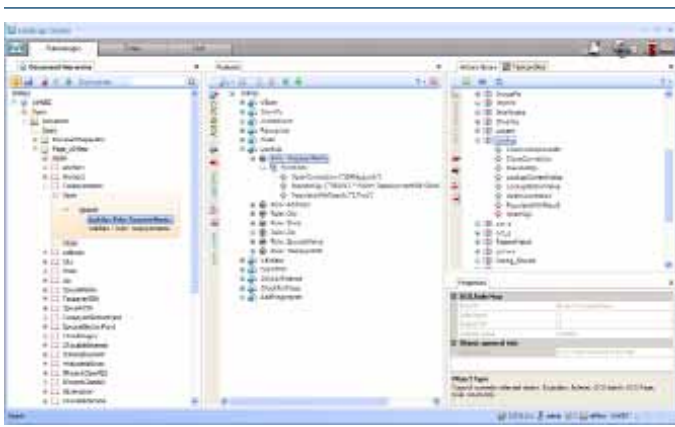

Figure 2:Datacap rules are easily configured in Datacap Studio's point and click interface.

Scalable architecture: Datacap Taskmaster Capture features a three-tier client server architecture that combines thin and thick client implementations for significantly increased flexibility. As the organization grows or as document volumes rise, the client can add more servers or more clients as needed to maintain peak performance. The independent research firm Doculabs has certified that a previous version of Datacap Taskmaster Capture can process one million documents a day.

"We realized we could use Datacap Taskmaster Capture's thin client verify system and have at-home workers do data entry and verification returns."

— Nancy Wilson, manager of automated process systems, Virginia Department of Taxation

Connector for IBM FileNet Capture: Integration with IBM FileNet Capture Professional enables IBM Datacap Taskmaster to add automation and thin client distributed capture to existing IBM FileNet Capture installations. This integration is included in base IBM Datacap Taskmaster Capture package.

Why is Datacap Taskmaster Capture the enterprise capture platform?

Rules-based capture is adaptable and extendible
Clients need minimal expertise and training to achieve advanced document processing. Rulerunner Service ships standard with hundreds of prebuilt actions and rules, which encompass every function of document capture. Working in Datacap Studio, the environment for building and testing capture applications, rules and actions are assembled like building blocks to configure even the most advanced capture applications – with no programming skill required.

Rules can be saved and reused in practically any configuration necessary. Rules developed for one application can be applied

to other applications. This copy-and-paste capability makes Datacap Taskmaster Capture faster and easier to extend from one department to another as capture is rolled out through the enterprise.

Rules are easily modified, so that when document processing requirements change, due to changing regulations or business rules, clients simply adjust the parameters or swap in new rules to comply. Datacap rules are the most efficient way to assure a flexible, adaptable capture system that can adjust to the changing needs of an enterprise.

Best-in-class capture

Datacap Taskmaster Capture offers support for multiple recognition engines, all configurable using rules. For documents that have barcodes, machine printed text, hand printed text or check boxes, Datacap Taskmaster Capture's open architecture enables users to determine which engine is the most accurate for that particular document, or even a specific field. Datacap Taskmaster Capture ships standard with two optical character recognition (OCR) engines, including the ABBYY FineReader™ and the Nuance ScanSoft engine®.

Control and measurement

For administrators, Datacap Taskmaster Capture offers tools and management reporting to help ensure that the system, stations and operators are working at peak efficiency. The Datacap Taskmaster Capture Job Monitor is designed to enable administrators to view the entire capture environment. Administrators can filter the Job Monitor to focus on a single process, batch or station. With the notification utility, clients can also program Datacap Taskmaster Capture to issue e-mail notifications whenever certain conditions occur, such as a batch being held for more than 24 hours or any similar scenario that they wish to monitor. Datacap Taskmaster Capture also delivers a spectrum of standard reports, issued daily, weekly or monthly, with productivity statistics on every aspect of the capture process.

Distribute scanning and verification using a browser

Datacap Taskmaster Capture offers clients an integrated solution for remote scanning or verification over the Internet using a browser. With tight integration between thin and thick client, Datacap Taskmaster Capture applications can combine remote scanning and verification with advanced thick client capture functions, such as document ID, recognition and validations, which require thick client processing. This three-tier client server platform delivers sophisticated capture capabilities practically anywhere in the world that, reducing shipping costs and accelerating input of documents.

"Datacap Taskmaster Capture provides us with the highest possible accuracy."

— Connie Laubenthal, director of medical laboratory evaluation, American College of Physicians

Capture unstructured documents

Datacap Taskmaster Capture features a multipronged strategy for locating data on unstructured documents. When a new document type enters the system Datacap Taskmaster Capture uses key word search combined with data location rules to find a high percentage of required data. Next, Datacap Taskmaster Capture verify panel enables operators to key data into the remaining fields with a single click on the image. Finally, when all data has been located and extracted, Datacap Taskmaster Capture creates a new fingerprint and stores it for document ID and data location purposes the next time that document is encountered.

Departmental capture applications

Datacap Taskmaster Accounts Payable Capture

Developed with input from accounts payable professionals, Datacap Taskmaster Accounts Payable Capture packages powerful functionality specially tailored for AP. Datacap Taskmaster automatically identifies the vendor associated with each invoice layout and remit-to zip code and attaches the correct vendor ID. Line item capture on single- or multiple-page invoices is standard. And there are AP-oriented validations, such as math calculations and purchase order line item reconciliation.

Figure 3: AP operators see the full invoice image, with data and image snippets for easy comparison. Color highlighting indicates problem characters or fields. Quick buttons give verifiers access to vendor tables, line item data, and purchase order line item reconciliation.

New invoice layouts are set up in minutes by AP professionals as they process invoices, not by IT resources that are both expensive and often difficult to obtain.

The result is reduced invoice processing time and cost, transforming accounts payable from a back-office burden to a nimble source of key strategic data. Some clients have reported more than a 50 percent reduction in invoice processing cost, which contributed to a return on investment in months.

- Fingerprint method uses pattern matching to identify documents by their layout
- Fingerprint stores all data location from initial setup process
- Operators enter data with a single mouse click
- Operator trains once and afterwards automatically locates detail lines
- Supports single-page and multiple-page invoices
- Supports fast implementation and reduced maintenance
- Includes purchase order line item reconciliation
- Supports other AP documents, such as attachments, expense reports, etc.
- Integrates with ERP systems

Datacap Taskmaster Medical Claims Capture

A pre-configured with data location and recognition rules assembled specifically for medical claims. There is no need for expensive and time-consuming template building to get started. The software is designed to capture 100% of the fields on United States' standardized medical claims, known as the CMS 1500 professional claims and UB-04 institutional claims
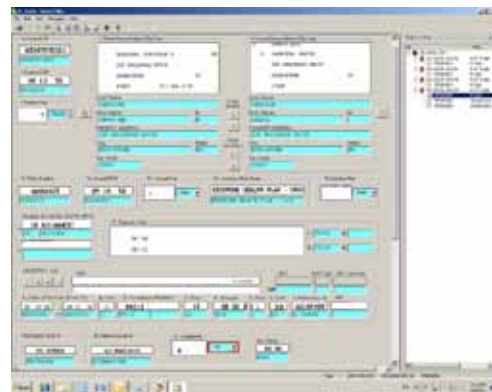
Figure 4: Verify operators see the full claim image, with data and image snippets for easy comparison. Color highlighting indicates fields that need operator attention.

right out of the box. Standard validations include database lookups of member, provider, diagnosis, and procedure codes. Export formatting is in the standard 837 Electronic Data Interchange (EDI) format that is fully compliant with the Health Insurance Portability and Accountability Act (HIPAA).

- Support for all CMS and variations with no pre-configuration of templates

- Black claim recognition

- Pre-configured capture for all fields on CMS 1500 and UB-04 claims

- Single and multi-page claim processing

- Attachment support

- Dynamic template generation for every page

- HIPAA-compliant 837 EDI export

- Permanent image overlay for archiving

Special connectors for Datacap Taskmaster Capture

Datacap Rulerunner Enterprise

When high volume document processing requires extra horsepower, IBM offers a high performance add on to Datacap Taskmaster Capture that takes full advantage of multicore processors and Services Oriented Architecture (SOA). Datacap Rulerunner Enterprise provides robust scalability with two performance enhancing capabilities:

- Support for virtualization inside of Datacap Taskmaster Capture through utilization of the multiple processors available on many computers
- Support for service-based document identification and data location features

Both capabilities deliver accelerated processing speed by leveraging additional technologies. Datacap Taskmaster Capture's open architecture enables easy and rapid scalability. When you need additional resources, for high powered capture, Datacap Rulerunner Enterprise delivers.

Datacap Taskmaster Capture Connector for Email and Electronic Documents

If you need to capture emails or electronic attachments, including Microsoft Word, Excel or Adobe PDF files, Capture Connector for Email and Electronic Documents saves time and tedium by converting electronic files to image format for rules-based data extraction. Designed for the organization that has gone beyond the mailroom, Datacap Taskmaster Capture Connector for Email and Electronic Documents applies the same document ID, data location, recognition and validation rules used on scans and fax images, while retaining the native electronic document for storage. The solution extracts the key metadata and transactional data required by your business quickly and accurately and then delivers both the indexed image and electronic file for storage and retrieval.

Datacap Taskmaster Capture Connector for Fax Input

An imaging application must stand ready to accept whatever form of document image enters the enterprise. Fax images continue to be a common input format for a great many industries, including healthcare, financial services, retail and manufacturing. With the Datacap Taskmaster Connector for Fax Input, configured with Rulerunner Service, Datacap Taskmaster Capture can be set up to check a single or many fax inboxes on a regular schedule or set to create a batch when a preset number of faxes accumulates. Datacap Taskmaster Capture pulls in the images and begins the capture process. Special image processing features and a handy visual separation panel helps separate batches of images into known documents.

Rules-based export formatting

Datacap Taskmaster Capture ships standard with seamless rules-based integration to IBM's portfolio of electronic content management (ECM) systems, including IBM Content Manager, IBM FileNet Content Manager and IBM FileNet Image Services.

For clients using other ECM systems, Datacap Taskmaster Capture can also be easily configured to deliver images and data using this set of add on products:

IBM Datacap Taskmaster Capture Connector for EMC Documentum

IBM Datacap Taskmaster Capture Connector for Microsoft SharePoint

IBM Datacap Taskmaster Capture Connector for OpenText LiveLink

Other ECM systems can be also be tightly integrated with Datacap Taskmaster Capture simply by modifying the export rules and actions in Rulerunner Service to convert images and data to the required format for efficient handoff with no loss of data or image quality.

Production Imaging Edition

Datacap Taskmaster Capture is a key component in IBM's Production Imaging Edition, an essential imaging kit that also includes IBM FileNet Content Manager, IBM BPM and IBM FileNet Workplace XT with Daeja ViewONE Pro.
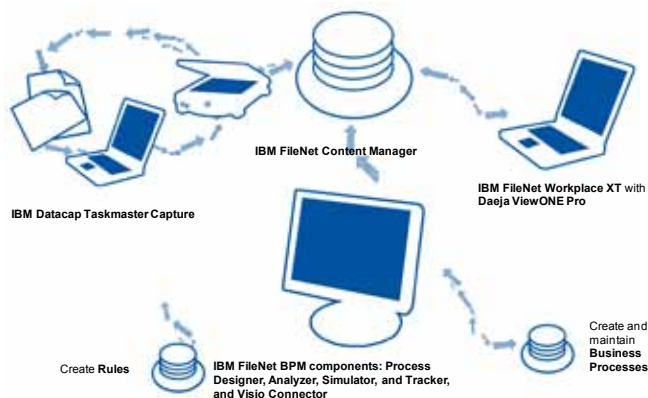
Figure 5: The power of advanced capture and scale of ECM - IBM Production Imaging Edition provides customers with a complete solution for managing the entire lifecycle of document imaging – capture through archiving – of data, forms and documents.

This solution combines IBM's best-of-breed imaging solutions into one seamless platform to manage the entire life cycle of document management, either across the enterprise or within individual departments.

Take control—maximize document input automation with these important features

Drive image input and enhance image quality
- Supports document scanners, multifunction peripherals and network scanners
- ISIS, TWAIN, and VRS support
- Image processing—deskew, line removal, orientation, color text conversion
- Manual and automated image QA
- Input from fax with Datacap Taskmaster Capture Connector for Fax Input
- Input content and attachments from email with Datacap Taskmaster Capture Connector for Email and Electronic Documents

Automate document identification
- Key word search
- Pattern match
- Leverage recognition with "smart separator" sheets
- "Fingerprint" match
- Visual separation panel
- Set expected page count per batch

Apply flexible recognition
- OCR—machine print recognition
- ICR—handprint and free-form handwriting recognition
- OMR—bubble and check box recognition
- Barcode and two dimensional barcode recognition
- Multiple recognition with voting

Raise accuracy
- Database lookup and value retrieval
- Check sums
- Math calculations
- Business-rule-based validations
- Cross-field validations
- Ergonomic user interface for editing and key-from-image

Deliver data

- Formatting for IBM FileNet® Content Manager, IBM Content Manager, and IBM FileNet Image Services
- Manage entire document lifecycle with IBM Production Imaging Edition
- Add-ons for EMC Documentum, Microsoft SharePoint, and OpenText LiveLink
- Supports SQL and Oracle
- ERP integration

Rapid setup for new documents

- Rules drive data location on unstructured documents
- Key word search
- Populate fields with a single click on the image
- Datacap Taskmaster Capture stores data locations after verification
- Creates a "Fingerprint" and stores it in the library for future use

Dictate the rules

- Prebuilt procedural rules help eliminate the need for custom programming
- Hundreds of standard actions in the actions library
- Datacap Studio offers a simple, point-and-click interface for configuring and testing rules
- Easily reuse rules for new document types and applications
- Microsoft ® VBScript-or .NET-based for easy customization

Best in class administration

- The report viewer enables a full set of standard and customized productivity reports
- The Taskmaster notification utility lets you set up email alerts for virtually any system scenario
- Job Monitor provides real view of all batches in progress in both network and web-based versions

About IBM Enterprise Content Management

IBM Enterprise Content Management software enables the world's top companies to make better decisions, faster. By gaining control of unstructured information, companies can access, collaborate and influence business decisions in new ways, making content a first-class source of insight. With industry-specific IBM ECM solutions, companies can capture, manage and share content throughout its lifecycle to help ensure compliance, reduce costs and maximize productivity. The IBM ECM portfolio includes a wide array of capabilities that integrate with existing systems to help organizations maximize the value of information including: document capture and imaging; social content management; advanced case management; information lifecycle governance and content analytics. More than 13,000 global companies, organizations and government organizations rely on IBM ECM to improve performance and remain competitive through innovation.

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