

Datacap Taskmaster Capture

Automate document input with integrated thick and thin client capture



Meet the document challenge with automated capture

According to the Association of Information and Image Management (AIIM), paper 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. Datacap Taskmaster Capture can help automate this process, 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 capture
- Automated indexing
- 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. It combines advanced capture functionality with superior flexibility. Clients use it to mix thin client and thick client implementations to create highly scalable, distributed capture applications with robust recognition, document identification and automated validations.

A procedural rules engine, known as Rulerunner Service, drives virtually all processing functions, from scanning through image enhancement, recognition and export. Competitive capture

systems may use rules, but they usually refer to enforcing business rules only. Datacap Taskmaster Capture uses rules at every step of the capture process, whether they're applied to the batch, document, page or field. 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.

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, which helps keep costs down and make data entry more efficient and cost-effective. 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.

“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

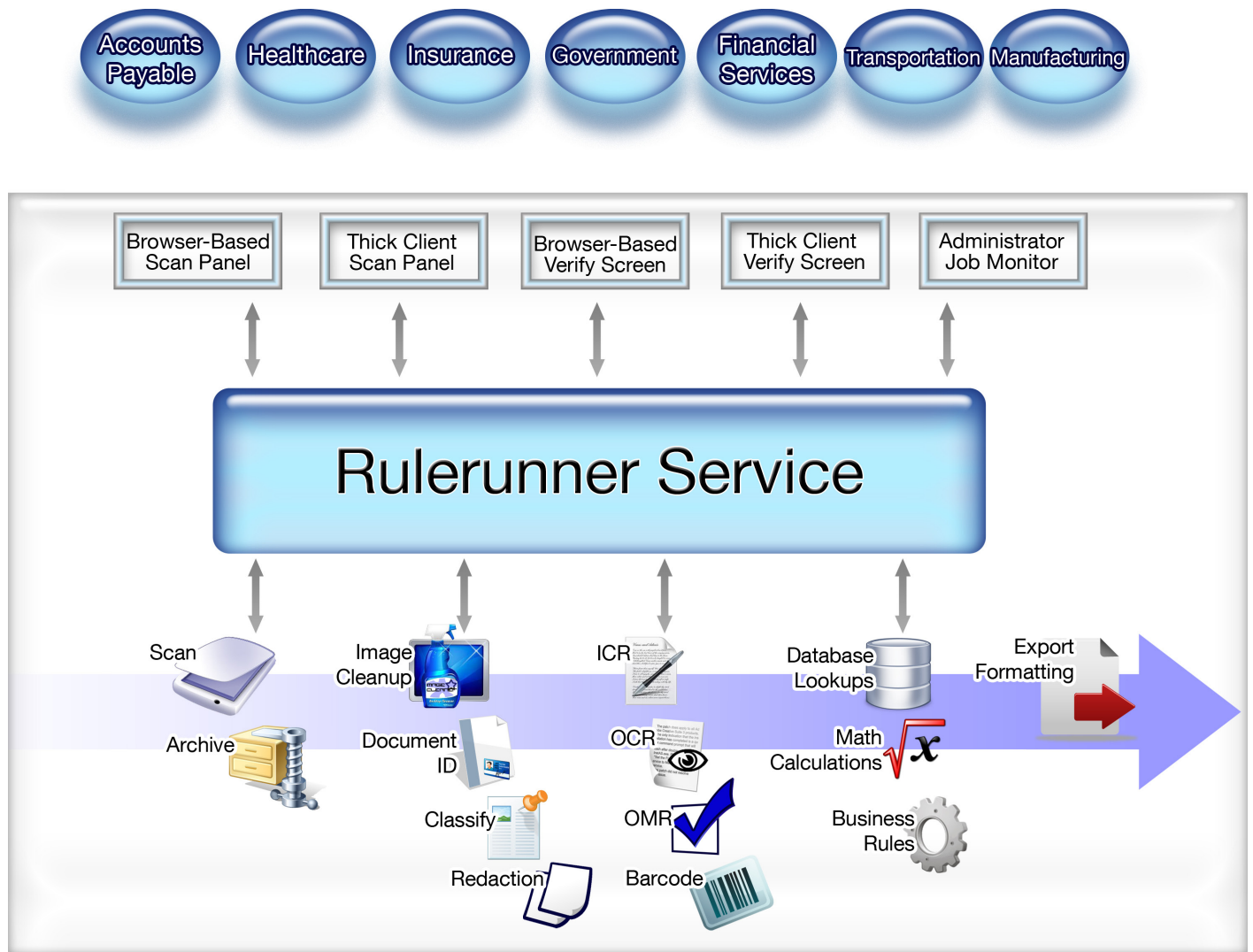


Figure 1: Paper-intensive industries leverage Datacap Taskmaster Capture's thick client and thin client interfaces to manage the capture process. Rulerunner Service drives all background processing, from scanning through image enhancement to recognition and delivery to target systems.

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 Taskmaster’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

Why select Datacap Taskmaster Capture?

Rule your data

Datacap Taskmaster Capture uses a procedural rules engine to automate scanning, routing and archiving tasks so that users need minimal expertise and training to achieve advanced document processing. Rulerunner Service ships standard with hundreds of prebuilt rules, which are assembled like building blocks to manage the entire process of document capture, from scanning and batching to document identification, image enhancement, recognition, validation and export formatting.

A rule is a series of actions organized in a logical sequence, and an action executes a single function. Users configure rules using Datacap Studio, a point-and-click tool that enables the building and testing of capture applications with no need for advanced programming. Often, multiple rules are arranged to accomplish a single task. For example, a set of rules can be configured to validate a social security number. First, a rule determines if the field is numeric, then a second rule

determines if the field has a minimum of 10 characters, then another judges if it has a maximum of 10 characters, then another removes dashes and so on.

Rules can be saved and reused in practically any configuration necessary. After assembling the social security rule example above, a user can call it again and use it on another social security field without having to reassemble it. Or it can be copied and modified to validate a different type of numeric data field, say a patient ID.

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 capability 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 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. They 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 can also issue daily, weekly or monthly reports with productivity statistics on 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 applications can combine remote

scanning and verification with advanced capture functions, such as document ID, recognition and validations, which require thick client processing. This interconnected three-tier client server platform delivers sophisticated capture capabilities practically anywhere in the world that documents are generated, reducing shipping costs and accelerating input of documents to deliver improved customer service and maintain high levels of productivity.

Capture unstructured documents

Datacap Taskmaster Capture features a multipronged strategy for locating data on semistructured and unstructured documents. When a new document type enters the system, first, Datacap Taskmaster Capture uses key word search combined with data location rules to find a high percentage of required data. Next, the Datacap Taskmaster Capture verify panel enables operators to Click N Key data into the remaining fields by simply clicking 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.

Datacap Taskmaster Accounts Payable Capture

Corporate and government accounts payable (AP) departments are still receiving and processing a high percentage of paper invoices. Datacap Taskmaster Accounts Payable Capture was built especially to help AP departments accelerate invoice processing while lowering data entry cost and increasing accuracy.

Developed with input from accounts payable professionals, Datacap Taskmaster Accounts Payable Capture packages powerful functionality especially for AP. Using Dynamic Natural Analysis (DNA), 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.

New invoice layouts are set up in minutes using such features as Click N Key, which populates unfilled fields with a single click, and Dynamic Details, which captures all line items after manually setting up the first one. The “Intellocate” feature commits all data location and vendor ID information to the “Fingerprint” library, where it will be available the next time the vendor submits another invoice.

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.

- DNA—Dynamic Natural Analysis
- “Intellocate” saves all data location from initial setup
- Click N Key enters data with a single mouse click
- Dynamic Details automatically locates detail lines
- Supports single- and multiple-page invoices
- Supports fast implementation and reduced maintenance
- Includes purchase order line item reconciliation (POLR)
- Supports other AP documents, such as attachments, expense reports, etc.
- Integrates with ERP systems

“Datacap Taskmaster Capture provides us with the highest possible accuracy.”

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

Take control—maximize document input automation with these important features

Drive image input

- ISIS, TWAIN, and VRS support
- Supports major scanners, multifunction devices and network scanners, including the following:
 - Canon
 - Epson
 - Fujitsu
 - ibml
 - Kodak
 - Panasonic
 - Ricoh
 - Visioneer

Enhance image quality

- Image processing—deskew, line removal, orientation, text reversal
- Manual and automated image QA

Automate document identification

- Key word search
- Pattern match
- Smart separators
- “Fingerprint” match

Apply flexible recognition

- OCR—machine print recognition
- ICR—handprint and free-form handwriting recognition
- OMR—bubble and check box recognition
- Barcode recognition
- Multiple recognition voting

Raise accuracy

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

Deliver data

- Formatting for IBM FileNet® Content Manager (P8)
- Supports SQL and Oracle
- ERP integration

Set up and add new documents using DNA

- Rules drive data location on unstructured documents
- Key word search
- “Click N Key” populates fields with a single click on the image
- Datacap Taskmaster “learns” 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 rules in the Rules Library
- Datacap Studio offers a simple, point-and-click interface for configuring and testing rules
- Easily reuse rules for new document types
- Microsoft® VBScript-or .NET-based for easy customization

About Datacap Inc., an IBM Company

Datacap provides award-winning ECM software for document capture and paper forms processing. These solutions help organizations worldwide improve the speed, accuracy and cost-efficiency of data extraction, making information more accessible. Using the latest technologies and innovations, Datacap solutions help automate a broad range of document-centric business processes in a wide variety of industries.

For more information about Datacap solutions, contact your IBM sales representative or IBM Business Partner, or visit:

www.datacap.com



© Copyright IBM Corporation 2010

IBM Corporation
Software Group
Route 100
Somers, NY 10589
U.S.A.

Produced in the United States of America
December 2010
All Rights Reserved

IBM, the IBM logo, and **ibm.com** are trademarks of International Business Machines Corp., registered in many jurisdictions worldwide. Other product and service names might be trademarks of IBM or other companies. A current list of IBM trademarks is available on the web at "Copyright and trademark information" at ibm.com/legal/copytrade.shtml

Microsoft is a trademark of Microsoft Corporation in the United States, other countries, or both.

References in this publication to IBM products or services do not imply that IBM intends to make them available in all countries in which IBM operates.

The information contained in this documentation is provided for informational purposes only. While efforts were made to verify the completeness and accuracy of the information contained in this documentation, it is provided "as is" without warranty of any kind, express or implied. In addition, this information is based on IBM's current product plans and strategy, which are subject to change by IBM without notice. IBM shall not be responsible for any damages arising out of the use of, or otherwise related to, this documentation or any other documentation. Nothing contained in this documentation is intended to, nor shall have the effect of, creating any warranties or representations from IBM (or its suppliers or licensors), or altering the terms and conditions of the applicable license agreement governing the use of IBM software.

Each IBM customer is responsible for ensuring its own compliance with legal requirements. It is the customer's sole responsibility to obtain advice of competent legal counsel as to the identification and interpretation of any relevant laws and regulatory requirements that may affect the customer's business and any actions the customer may need to take to comply with such laws. IBM does not provide legal advice or represent or warrant that its services or products will ensure that the customer is in compliance with any law.

All customer examples described are presented as illustrations of how those customers have used IBM products and the results they may have achieved. Actual environmental costs and performance characteristics may vary by customer.



Please Recycle