# Datacap Taskmaster Capture—the enterprise capture platform

*A scalable platform for configuring intelligent document capture solutions that can reduce cost and improve customer experience*

## Smarter document capture creates enhanced customer satisfaction

For most organizations, the delivery of a product or service depends on the exchange of documents that are the record for all transactions. How organizations manage documents can have a huge effect on the quality of the experience for their customers, patients, students or constituents.

Smarter document capture leverages technologies that convert documents to searchable images, automate data entry, identify documents, check data quality and format data for use by business systems. By automating labor-intensive, error-prone processes, Datacap Taskmaster Capture software can accelerate document processing capacity and reduce cost. More important, Taskmaster Capture can remove many of the obstacles that degrade service quality to help organizations create deeper engagements with their customers.

Document capture can accelerate mortgage approvals and claim resolutions, provide patient records to doctors in seconds, help ensure rapid invoice payment for goods and services, help governments survey citizens for better planning, deliver more-accurate test results, and make sure that customer service representatives have the documents they need to respond to virtually any inquiry immediately.

Taskmaster Capture delivers a broad range of capture capabilities in a single product with several clear advantages:

- **Architecture** enables intelligent capture to be deployed practically anywhere and anytime—mixing thin and thick clients to make flexible and scalable solutions.
- **A procedural rules engine** makes configuring or document capture functions simple and fast.
- **User-based licensing** offers improved total cost of ownership.

## Select a licensing model that fits the business

IBM offers several ways to license Datacap Taskmaster applications with flexible pricing and functionality, depending on the needs of the enterprise.

- **Datacap Taskmaster Entry Level** for basic scan and indexing projects
- **Datacap Taskmaster Capture** to build advanced capture applications
- **Datacap Taskmaster Accounts Payable Capture** for accounts payable (AP) automation
- **Datacap Taskmaster Medical Claims Capture** for cost-effective and compliant capture of claims
- **Datacap Taskmaster Enterprise Edition** bundles together the typical high-volume add-ons and connectors into a single part number.

### A versatile tool for content management

Datacap Taskmaster Capture was designed for enterprisewide deployments for government, insurance, healthcare, financial services, manufacturing, retail and transportation, to name a few. Choose Taskmaster Capture for the following features:

- Document scanning and archiving
- Email, fax and electronic document input
- Automated indexing for storage and retrieval
- Multiple document identification and classification methods, including content analytics
- Multiple engines for optical character recognition (OCR), intelligent character recognition (ICR), optical mark recognition (OMR) and bar codes (2-D included)
- Extraction of natural handwriting
- Localized extraction and user interfaces in European and African languages, Cyrillic, and Simplified Chinese
- Distributed, browser-based capture for remote scanning
- SAP integration for purchase order (PO) matching, HR and contract management
- High-volume performance with multicore processing

## How smarter capture enables better business outcomes

**Enhance customer experience:** Taskmaster Capture makes paper processes move at the speed of electronic transactions. Taskmaster Capture is designed to eliminate the obstacles of expensive, time-consuming paper processing to deliver products and services faster and help ensure that documents are instantly available for responsive customer service.

**Increase productivity:** By significantly reducing manual data entry and storage of paper documents, knowledge workers can more quickly access documents for approvals, customer service, case management, transactions and compliance.

**Streamline process:** Taskmaster Capture can help eliminate cumbersome paper processes by enabling clients to automate labor-intensive aspects.

**Reduce cost:** Taskmaster Capture can significantly reduce data entry. Distributed scanning enables clients to reduce document shipping costs. And automated document identification replaces the time-consuming sorting of documents.

**Increase accuracy:** By eliminating the errors that data entry operators make, Taskmaster Capture can save time finding and fixing faulty data or misplaced document images.



*Figure 1*: Datacap Taskmaster Capture screens present images and data for fast verification.

**Provide flexibility:** The procedural rules engine that executes capture functions uses .NET and VBScript standards. Clients can configure advanced capture applications with customized panels and special features to address their business objectives. And when documents and business rules change, Taskmaster Capture can quickly adapt without expensive programming.

**Scale and perform:** Taskmaster Capture combines thin and thick client implementations with Rulerunner Service, a procedural rules engine that is service-oriented architecture (SOA) ready. As the organization grows or as document volumes rise, organizations simply expand their use of Rulerunner Service to maintain peak performance.

*"The IBM Enterprise Content Management platform underlying our AP system gives us both the control and flexibility we need to effectively manage a diverse and changing vendor base and multiple approvers across our ministries."*

—Steve Koors, accounts payable manager, St. Vincent Health

**Report and measure:** Many standard productivity and management reports, as well as real time notifications, provide visibility over the entire process for administrators and management.

**Expand to new challenges:** Taskmaster Capture was built to grow as an organization grows its document strategy. Taskmaster Capture can extend into solutions for integrated imaging, advanced case management, analytics, social content management, and legal and regulatory compliance.
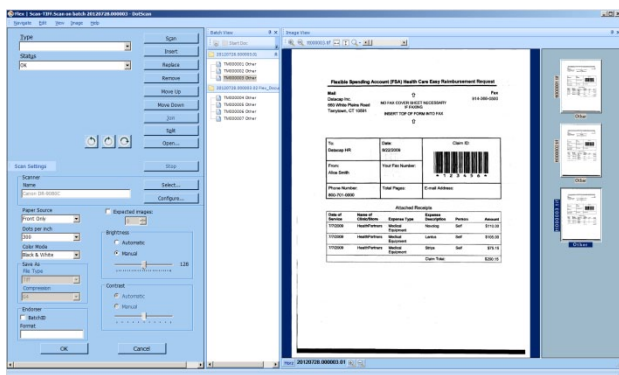
## Datacap Taskmaster Entry Level—get started

Datacap Taskmaster Entry Level offers a set of intelligent capture capabilities far beyond competing offerings yet requires minimal setup to start scanning in minutes.

Use Taskmaster Entry Level to transform documents into indexed images for rapid storage and retrieval. The cost savings come from several innovations that provide Taskmaster Entry Level with greater efficiency:

* A user interface that enables rapid application deployment with easy setup of new documents
* The ability to import images from scanners and multifunctional devices (MFDs)
* Full-text or field-based extraction of typed text
* Bar code, check box and advanced pattern matching for document identification
* Intuitive user interface with automated validations
* Tight integration to enterprise content management (ECM) repositories

Taskmaster Entry Level can be used for mail room capture operations, back-file conversions, and basic scanning and archiving for departments and small businesses. Add Datacap Taskmaster Connector for Microsoft SharePoint software for intelligent capture tightly integrated with SharePoint technology.
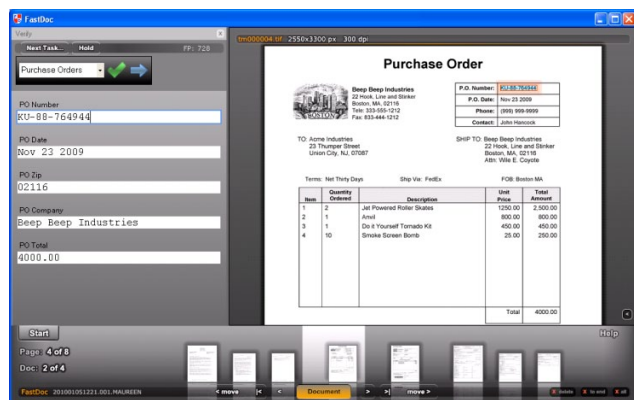


*Figure 2*: The feature-rich user interface in Datacap Taskmaster Entry Level

### Scalable intelligent image capture

Taskmaster Entry Level users can leverage zonal and full-page OCR to extract data for key indexes or create full-page searchable PDFs. They can apply several methods for automated document identification, including bar code and check box capture and the Datacap application's innovative fingerprint method. The intuitive user interface enables scanning and verification and creates fingerprints on the fly with no programming or templates required.

Taskmaster Entry Level can deliver significant productivity improvements for organizations that need a simple approach to document capture. Taskmaster Entry Level can be extended beyond paper with Taskmaster connectors to convert email, fax and electronic attachments for indexing and storage.

Tight integration with IBM repositories is available standard, or you can add one or more Taskmaster connectors to sync with repositories from EMC, OpenText and Microsoft.

After you get started with smarter capture, you may wish to add more power and capabilities. Perhaps you have hand-printed documents or you want browser-based scanning or you want full AP automation with integration to SAP or Oracle. You can upgrade your application to a Taskmaster Capture deployment with much more document automation.

## Datacap Taskmaster Capture—smarter capture for the enterprise

Datacap Taskmaster Capture is the result of more than 20 years of development by a consistent team of designers. From the beginning, the goal has been to assemble a highly flexible set of automation capabilities within a scalable architecture for high-volume document capture. Today, the award-winning Taskmaster Capture represents the state of the industry and is being deployed by some of the world's largest banks, insurance companies, healthcare providers and government agencies.

*"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

Hundreds of capture functions are available in Taskmaster Capture to create robust enterprise solutions that deliver significant value:

- Browser-based capture for distributed scanning and verification practically anywhere
- Document aggregation by unifying scan, fax, email and electronic attachments
- A spectrum of document classification techniques working together to deliver speed and performance
- Multiple recognition engines from leading suppliers for hand print, check box, machine print, bar code and even natural handwriting.
- A repertoire of validations, database lookups, math calculations, checksums and business rule enforcement

## How organizations use Datacap Taskmaster Capture

Taskmaster Capture is capable of automating common and uncommon document input applications. Common scenarios include:

- AP automation with line-item capture and reconciliation with POs in the enterprise resource planning (ERP) system (SAP, Oracle, Lawson and more)
- Medical claims capture with compliant delivery

- Mortgage processing with classification using IBM Watson™ content analytics
- Distributed branch scanning for real-time capture
- Survey and census processing with rapid extraction of hand-printed forms
- Medical records scanning and analysis
- Tax form processing for government revenue
- New customer onboarding, patient admittance and license application
- Document conversion for advanced case management
- Pharmacy-based prescription imaging
- Correspondence tracking
- High-volume, high-speed scanning and archiving
- Sales order and subscription data entry and processing
- Explanation of benefit (EOB) processing

Taskmaster Capture was built for creativity. If you can do it manually, then you can automate it in Taskmaster Capture.
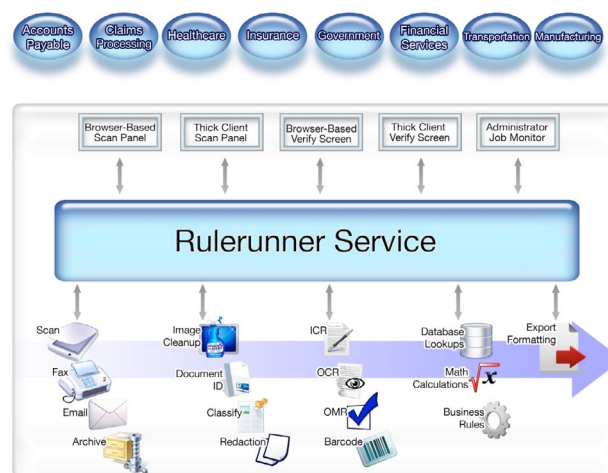


*Figure 3*: Rulerunner Service is the procedural rules engine that drives capture functions in Datacap Taskmaster Capture.

## Create the rules

Configuring an application in Taskmaster Capture is done in Datacap Studio, an environment to assemble and test capture systems that will be executed by the procedural rules engine, called Rulerunner Service, that drives each step of the capture process. Point and click to assemble a set of rules from a vast library of pre-built actions that Rulerunner Service will trigger to process your documents—faster and at less cost than custom programming. Or modify or create new actions with VBScript or .NET.

Rules can be saved and reused. Rules developed for one application can be applied to other applications. This copy-and-paste capability helps Taskmaster Capture extend from one department to another as capture is rolled out through the enterprise.
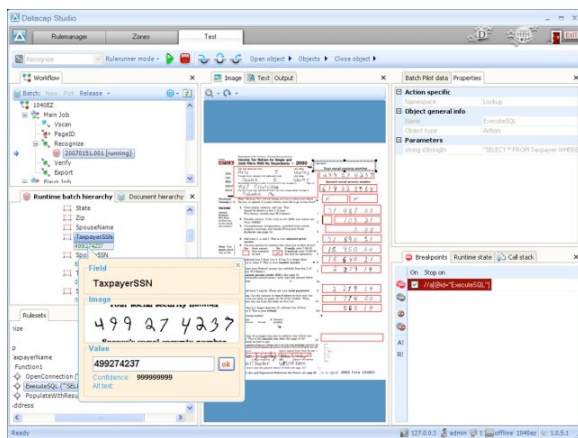


*Figure 4*: Use Datacap Studio for building rules.

## Capture "anywhere, anytime"

### Distribute scanning and verification using a browser

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, Taskmaster Capture applications can combine remote scanning with advanced thick client capture functions, such as document ID, recognition and validations. This three-tier client server platform delivers sophisticated capture capabilities practically anywhere in the world, helping reduce shipping costs and accelerating input of documents.

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

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

## Capture and classify unstructured documents

Taskmaster Capture features a multistep strategy for identifying and classifying documents, a common challenge for mortgage processing as well as legal and healthcare capture. When a new document is encountered, Taskmaster Capture applies a series of queries. First it might look for a bar code with the necessary metadata. If no bar code, then Taskmaster Capture can compare the layout to a library of layouts called fingerprints. If it doesn't get a definitive match, it can search for keywords that might identify it, such as statement or certificate of occupancy. If it still doesn't get a match, then Taskmaster Capture can call IBM Content Classification and determine the document type by its content.

# Best-in-class data extraction

## Leading text recognition engines

Taskmaster Capture offers support for multiple recognition engines. For documents that have bar codes, machine-printed text, hand-printed text or check boxes, Taskmaster Capture software's open architecture enables users to determine which engine is the most accurate for that particular document or even a specific field. Taskmaster Capture ships standard with three OCR engines: ABBYY FineReader, OpenText Capture Recognition Engine (RecoStar) and Nuance ScanSoft.

*"Everyone is raving about the retrieval capabilities, and customer service has improved, which makes us more competitive."*

—Scott Courson, business systems analyst, Murphy-Hoffman Company

## Localize language

During setup, Taskmaster Capture can be configured to recognize and extract data as well as present localized panels for verification and quality assurance (QA) in dozens of European and African languages. Taskmaster Capture also supports Cyrillic and Simplified Chinese.
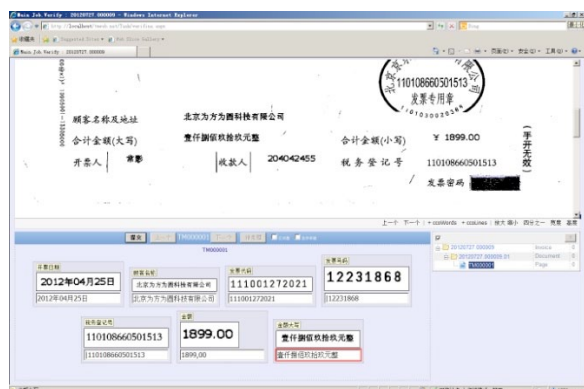


*Figure 5*: Datacap Taskmaster Capture web verify panel in Simplified Chinese



*Figure 6*: Datacap Taskmaster Capture is a scalable capture platform that enables the application of a range of document automation technologies.

## Help ensure accurate data

The untold secret behind the success of advanced document capture is concealed in the techniques for boosting recognition accuracy that you don't get in simple OCR systems.

Database lookups can compare individual fields on a document to known data. For example, zip code lists can confirm cities and states, Current Procedural Terminology (CPT) codes can confirm a medical diagnosis, a customer identification database can confirm names, and math calculations can confirm totals. Other abilities include the use of picture strings, regular expression and adaptable rules to confirm date formats and number formatting.

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

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

## Manage exceptions in a rich verification environment

Taskmaster Capture offers a customizable approach to presenting images and data to verify operators. To boost productivity, a single screen can be used for key-from-image, field edits, line-item display, database lookups, PO matching and even setup of new document types.

## Deliver smart images and data

When the capture process is done, indexed images are forwarded to the archive, and data is formatted for use by ERP (SAP, Oracle, Lawson, etc.), customer relationship management (CRM), business intelligence (BI), and web portals. Taskmaster Capture offers tight integration with IBM ECM repositories, while non-IBM repositories require an add-on connector.

## Preconfigured applications

### Datacap Taskmaster Accounts Payable Capture

Developed with input from AP professionals, Datacap Taskmaster Accounts Payable Capture packages powerful productivity features. It is designed to automatically identify the vendor associated with each invoice layout and attach the vendor ID. Line-item capture on single- or multiple-page invoices is standard, and it includes AP-level business rules and data validations. PO line-item reconciliation helps ensure a rapid, three-way match in the ERP system.

*"As a result, we are delivering better customer service for not only internal inquiries but to our vendor community as well."*

—Seth Linebrink, manager of financial reporting and accounts payable, Invacare Corporation

### Datacap Taskmaster Medical Claims Capture

Datacap Taskmaster Medical Claims Capture is a preconfigured solution for capturing data from medical claims for more-accurate, more-efficient adjudication. The software is designed to capture 100 percent of the fields on CMS-1500 professional claims and UB-04 institutional claims. 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).

*"We like the thin client verify solution because there's really no maintenance required on the clients."*

—Local area network (LAN) administrator, nonprofit health insurer

## Taskmaster add-on connectors

### 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, Datacap Taskmaster Capture Connector for Email and Electronic Documents can save time and tedium by converting electronic files to image format for rules-based data extraction. Designed for the organization that has gone beyond the mail room, Datacap Taskmaster Capture Connector for Email and Electronic Documents applies the same processing rules used on scans 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**
Fax images continue to be a common input format for many industries, including healthcare, financial service, and retail. With the Datacap Taskmaster Capture Connector for Fax Input, Taskmaster Capture can be set up to check fax in-boxes on a regular schedule or to create a batch when a minimum number of faxes accumulate. Taskmaster Capture pulls in the images and begins the capture process.

*"Since implementation, we've doubled the number of documents that go through Task-master Capture. We have a formal process to evaluate if each document type is a fit for imaging and, if it is, our team can go into IBM Datacap Studio to set up the functional requirements for capture."*

—Scott Courson, business systems analyst, Murphy-Hoffman Company

**Datacap Taskmaster Capture Connector for IBM Content Classification**
Many mortgage, legal and healthcare applications require a highly accurate method of classification using text analytics to determine the document type by its content. This connector enables Taskmaster Capture to apply IBM Content Classification to a document or set of document images to identify and classify. IBM Content Classification is a key technology used in IBM Watson technology.

**Datacap Taskmaster Capture including Parascript FieldScript**
Parascript FieldScript adds the ability to recognize hand print, cursive and poor-quality machine print (that might not be recognized by other engines). FieldScript adds to Datacap Taskmaster Capture the ability to extract valuable information that would otherwise be manually keyed or ignored. Language support includes English, French, German and Russian.

## Feeding the repositories
Taskmaster Capture offers seamless, rules-based integration to IBM's portfolio of electronic content management systems, including IBM Content Manager, IBM FileNet® Content Manager, IBM FileNet Image Services and IBM Content Manager OnDemand software.

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

- Datacap Taskmaster Capture Connector for EMC Documentum
- Datacap Taskmaster Capture Connector for Microsoft SharePoint
- Datacap Taskmaster Capture Connector for OpenText Livelink

## Datacap Taskmaster Capture Rulerunner Enterprise

If volumes or high usage requires more processing power, the Rulerunner Enterprise add-on enables Taskmaster Capture to take advantage of multicore processors and SOA. Rulerunner Enterprise provides robust scalability with two performance-enhancing capabilities:

- Support for virtualization inside of Taskmaster Capture with multiple versions of Rulerunner Service running on multiple processors simultaneously
- Support for service-based fingerprint document identification and data location features

Both capabilities deliver accelerated processing speed, and Taskmaster Capture software's open architecture enables easy and rapid scalability.

## Datacap Taskmaster Enterprise Edition

High-volume operations and users with complex capture requirements can take advantage of a special pricing bundle of the common connectors with high-volume processing. For one user-based price, leverage four essential pieces of enterprise capture: Datacap Taskmaster Capture Rulerunner Enterprise, Datacap Taskmaster Capture Connector for Email and Electronic Documents, Datacap Taskmaster Capture Connector for Fax Input, and Datacap Taskmaster Capture Connector for IBM Content Classification with entitlement to Content Classification included.

Datacap Taskmaster Enterprise Edition is a convenient way to purchase and deploy enterprise capture applications. Get a high-performance platform, conversion and input for document channels, and advanced content analytics for document ID and classification—licensed entirely per authorized user.

## The checklist

Datacap Taskmaster Capture excels in the key areas that most organizations use to evaluate a solution:

- **Return on investment (ROI)**—Taskmaster Capture is priced per user, not by click or per image, making a more predictable budgeting process and a better total cost of ownership.
- **Impact on the customer experience**—Taskmaster Capture accelerates slow document-based processes, which cause frustration for customers. Capture helps improve customer satisfaction by making documents available to decision makers and service providers on command, reducing errors and lost documents and formatting documents for customers to view online.
- **Flexibility**—Taskmaster Capture was built to handle the many variables of capture. The ability to mix browser and thick client implementations gives the user flexibility over the location of the capture process. The ability to import images from scanners, MFDs and archives as well as the conversion of fax, emails and electronic documents gives users flexibility in a multichannel environment.
- **Configurability**—Taskmaster Capture was built to handle the many variables of capture. Each application is a set of capture rules that execute in seconds as a document image makes its way through the steps. This highly granular approach provides extreme flexibility but without the need for time-consuming and expensive programming or templates.
- **Scalability**—Taskmaster Capture is capable of scaling to millions of documents because of an architecture that separates the capture functions from the batch management. As volumes or users rise, scale up by adding instances of Rulerunner Service and more processing capacity. The Rulerunner Enterprise add-on enables the use of multicore systems and database services to increase performance.

- **Security**—Taskmaster Capture supports compliance with Federal Information Processing Standards (FIPS) for password encryption. Support for Microsoft Active Directory Lightweight Directory Services authenticates user IDs and passwords against one or more (Lightweight Directory Access Protocol, or LDAP) servers. And support for IP version 6 enables virtually unlimited IP addresses for direct and security-rich network connections.
- **Adaptability**—Taskmaster Capture supports European and African languages, Cyrillic, and Simplified Chinese for text extraction and for the verification user interface, enabling processing staff to work in their local language.
- **Reporting**—Taskmaster Capture offers several ways to monitor and report on system and user performance. Administrators can view work in progress in the job monitor locally or in a browser and filter it to focus on a single process, batch or station. NENU is an advanced notification utility that can issue email alerts when certain conditions occur in the capture process. RV2 is a configurable report viewer with many standard reports with productivity statistics issued daily, weekly or monthly. Taskmaster Capture also ships with the system dashboard for ECM, which can display capture performance data. Taskmaster Capture also supports IBM FileNet System Monitor software for proactive application health management.
- **Open integration**—Taskmaster Capture connects with ECM, ERP, BI, analytics and a wide assortment of line-of-business systems and outputs data and indexed images in a variety of formats to suit virtually any need.
- **Deployment**—Clients can choose between implementing Taskmaster Capture with their own staff, with a certified IBM Business Partner or with IBM.

## Why IBM?

Software is helping build a smarter planet, giving organizations more opportunities to realize their potential and break new ground. To achieve such goals, businesses need software that is fueled by expertise, built for change and ready for work. IBM ECM solutions can help.

Our comprehensive ECM portfolio—including industry solutions from IBM Business Partners—helps businesses manage unstructured content, optimize business processes and address complex compliance requirements. Our deep ECM capabilities support an information agenda—the IBM approach to using information as a strategic asset through better business and IT alignment.

## About IBM ECM software

IBM ECM software enables the world's top companies to make better decisions, faster. By gaining control of unstructured information, companies can access information, 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, helping 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 software to improve performance and remain competitive through innovation.
**ibm.com**/software/ecm