
What Can Advanced Document Capture Do For Your Organization?

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Presenters



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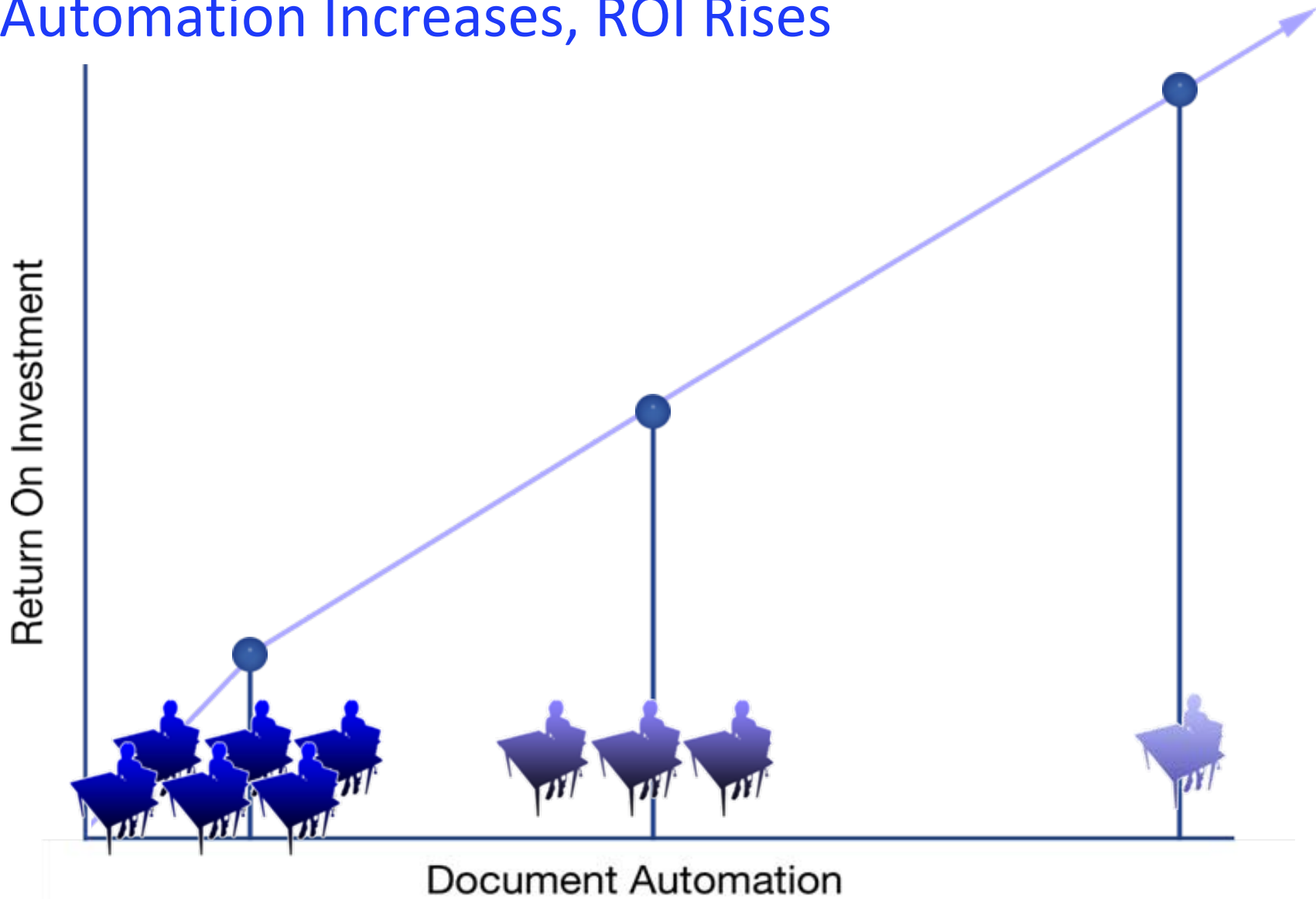
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Product Marketing Manager,
Document Capture,
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Agenda

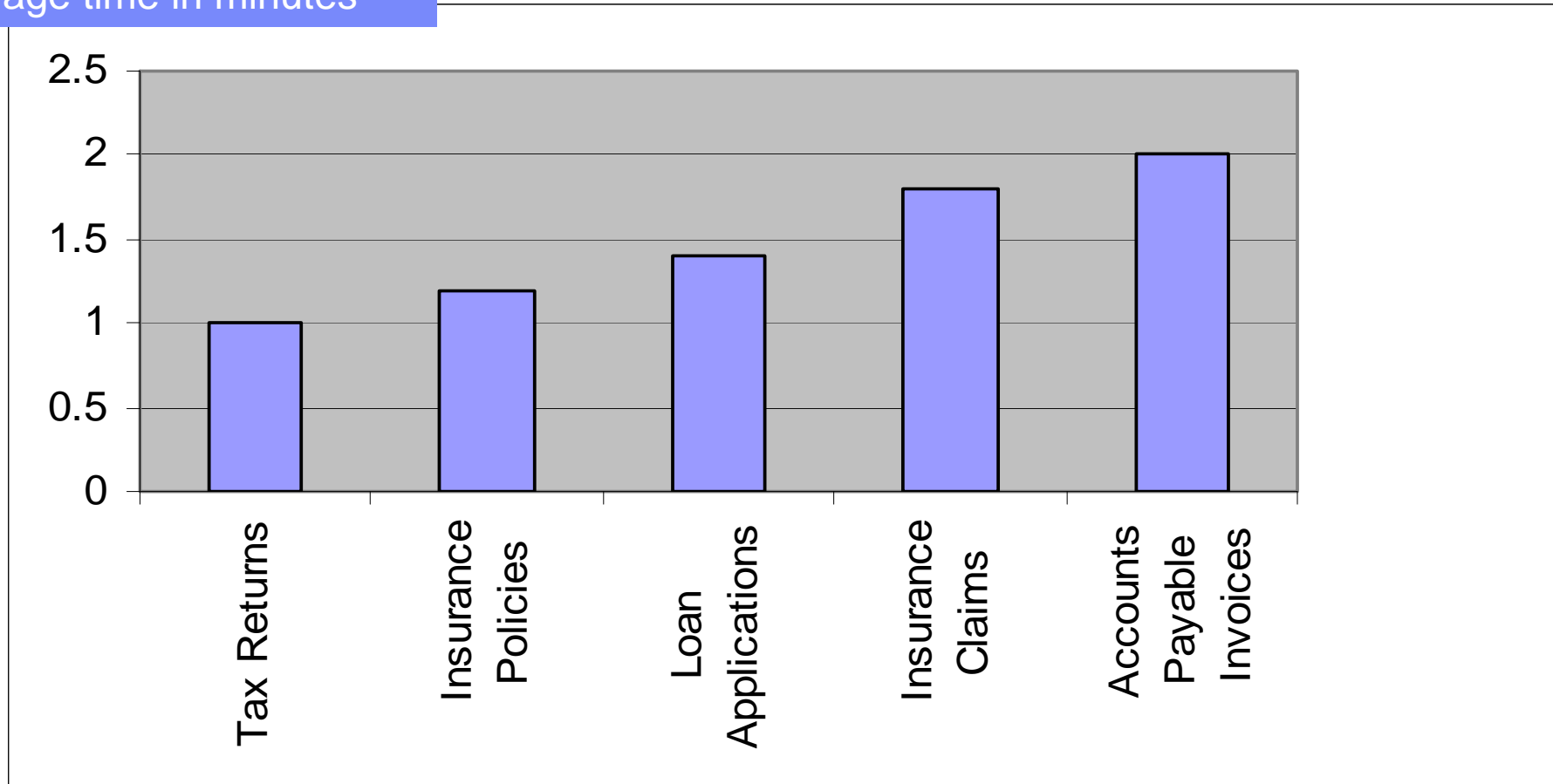
- Why Document Capture?
- The Five Phases of Document Capture
 - What are the 5 Phases?
 - What are the benefits of each?
 - Use cases
- IBM Datacap Taskmaster Capture
- Targeted Applications
 - Accounts Payable
 - Medical Claim
- Taskmaster Add-Ons
- Discussion on Your Document Strategy

As Automation Increases, ROI Rises



Manual Data Entry Time Spent Per Document

Average time in minutes



Sources: Health Data Management, IOMA, Datacap

Capture Means Many Things To Many People



The Five Phases Of Capture

1. Scan and Store

Capture drives Scanners, provides Key From Image

2. Basic Recognition

Add OCR and barcodes to Automate Indexing

4. Distributed Capture

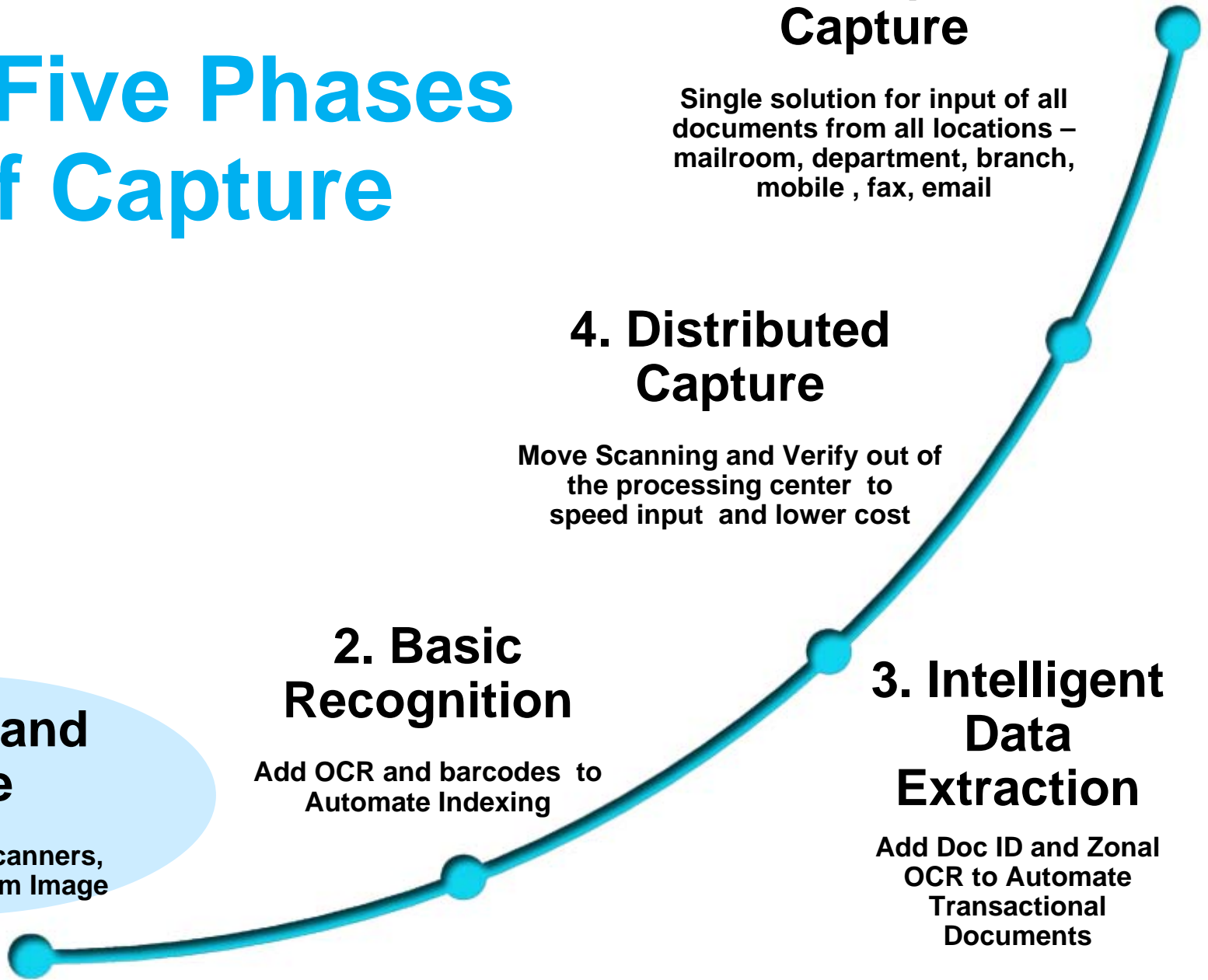
Move Scanning and Verify out of the processing center to speed input and lower cost

3. Intelligent Data Extraction

Add Doc ID and Zonal OCR to Automate Transactional Documents

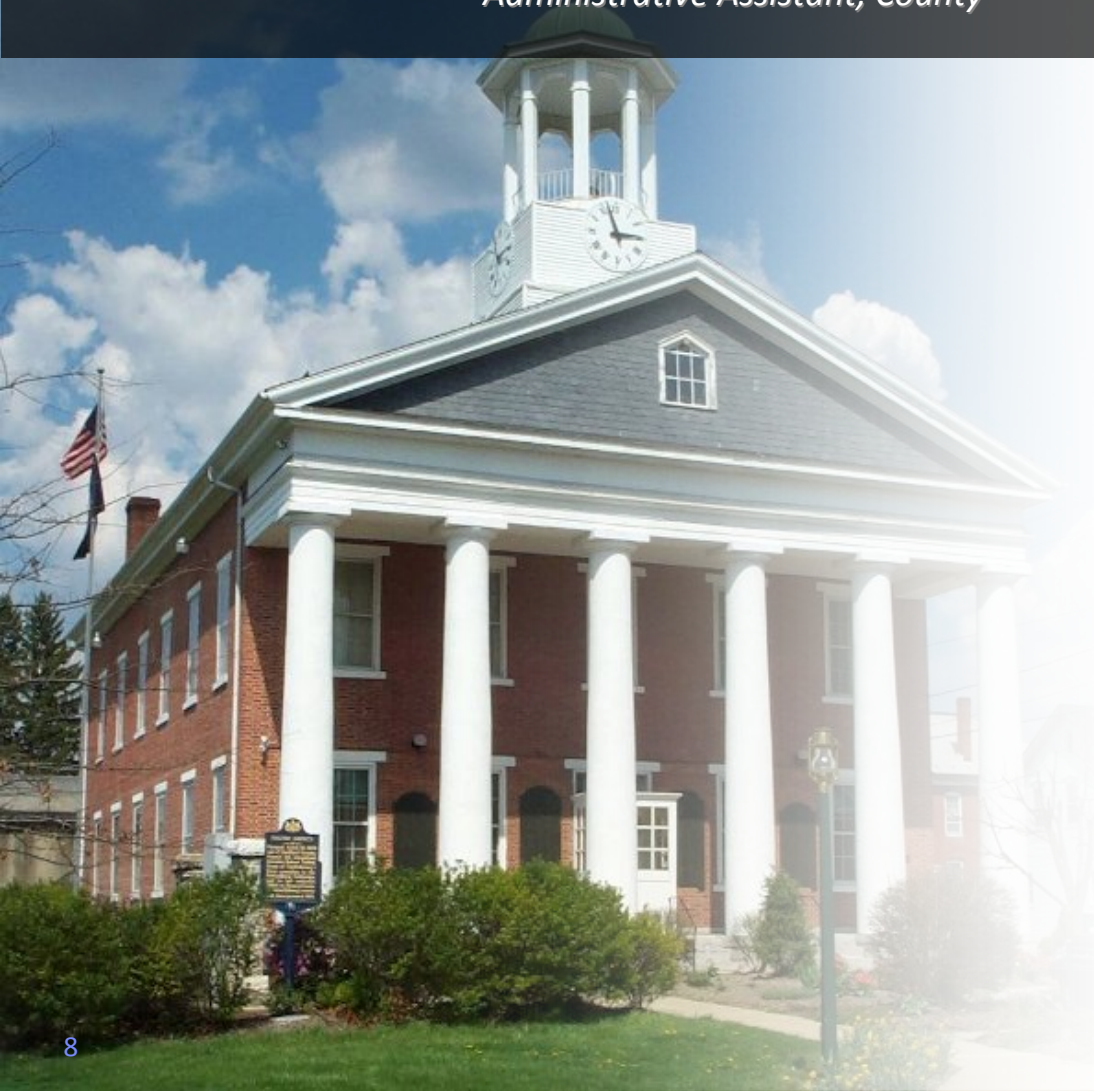
5. Enterprise Capture

Single solution for input of all documents from all locations – mailroom, department, branch, mobile , fax, email



County Government Scans Healthcare Documents

*“We’ve gotten rid of 16 file cabinets and two storage spaces and we’ve still got a long way to go!” –
Administrative Assistant, County*



- ✓ Scanning health and legal records going back 100 years to free up storage space.
- ✓ IBM Datacap Taskmaster Capture drives the scanners and presents each operator with several document types to choose from.
- ✓ Once the operator selects the document type from a dropdown menu, several data fields appear, which are manually entered for index purposes.
- ✓ The image is routed to IBM Content Manager and the paper can be disposed

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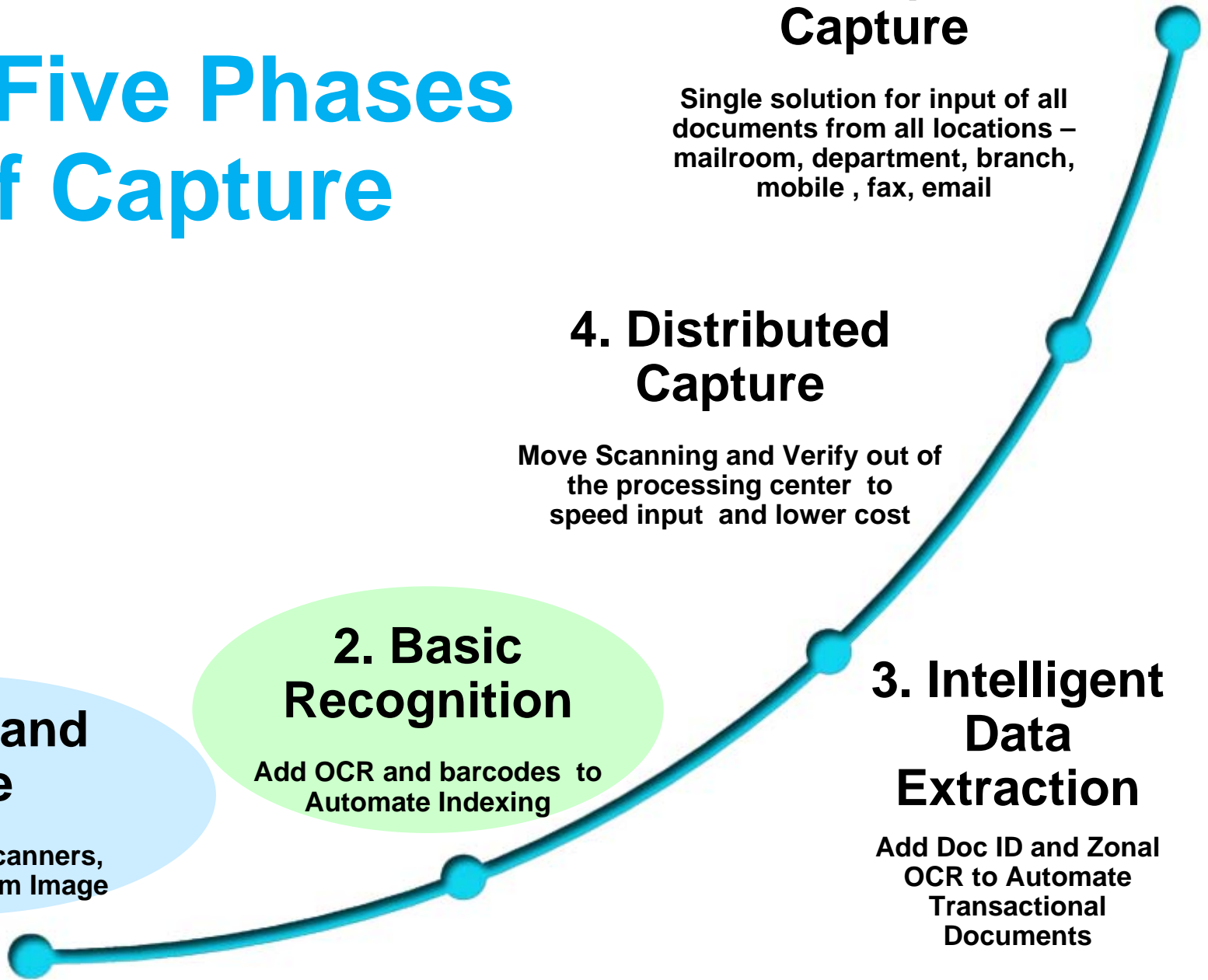
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Manufacturing Company Image-enables Human Resources

"I used to spend several hours scanning and typing data, now I just scan." – Human Resources Manager



- A small manufacturing company is using IBM Datacap Taskmaster Capture to scan Human Resources documents, including applications, payroll, benefits, employee review and correspondence.
- Before scanning, each document type is separated and a document ID sheet with bar code and checkboxes is placed in front of it.
- When scanned, Taskmaster “reads” the separator sheet and applies the proper document ID and index data to the document that follows.
- Index data is checked by a verifier and the image is routed to IBM FileNet Image Services.

Recognition-Assisted Indexing



Document Separator



Please select the valid policy “Bucket” (choose only one per Separator page):

- 1. Original Policy
- 2. Post-Issuance Endorsements
- 3. Post Binding Correspondence
- 4. Coding Information
- 5. Binder
- 6. Pre-Binding Correspondence
- 7. Surveys/Inspection Report
- 8. Certificate of Insurance
- 9. Premium Finance Agreement

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Dow Jones & Company Automates Subscription Processing

“Datacap Taskmaster Capture enables us to scan and capture critical customer information and quickly process our subscription orders.”

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



- Dow Jones’ central processing center receives 8,000 subscription postcards a day – up to 50 different offers, each with its own layout
- Each card has a unique 11 digit code beginning with the letter B
- IBM Datacap Taskmaster Capture searches the document for the code, using intelligent location rules. With the number, Taskmaster retrieves the offer details associated with each card
- Taskmaster extracts name and address and length of subscription information and passes it for processing
- Detailed reporting in Taskmaster informs Dow Jones of its cash position at the end of each day

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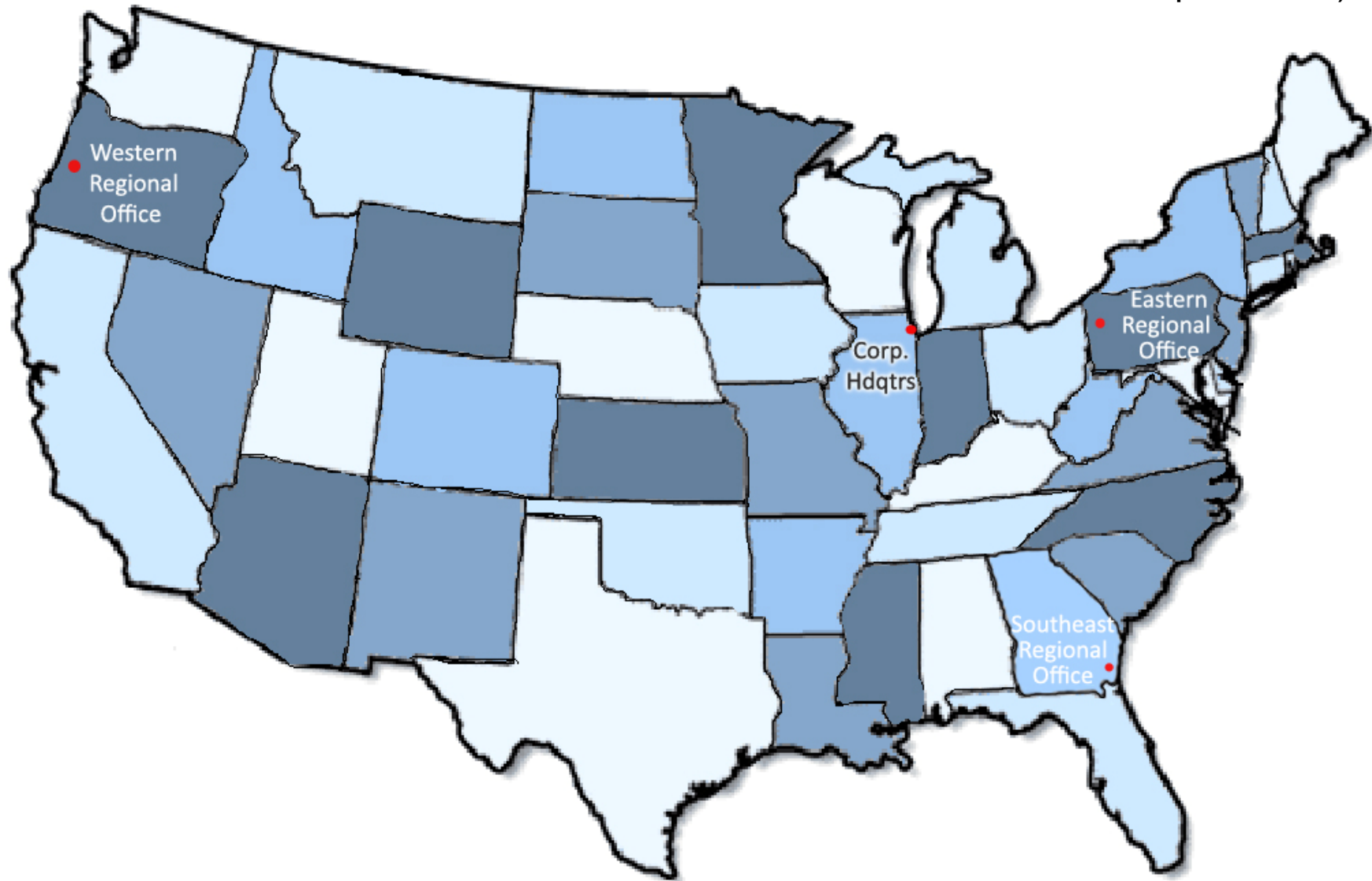
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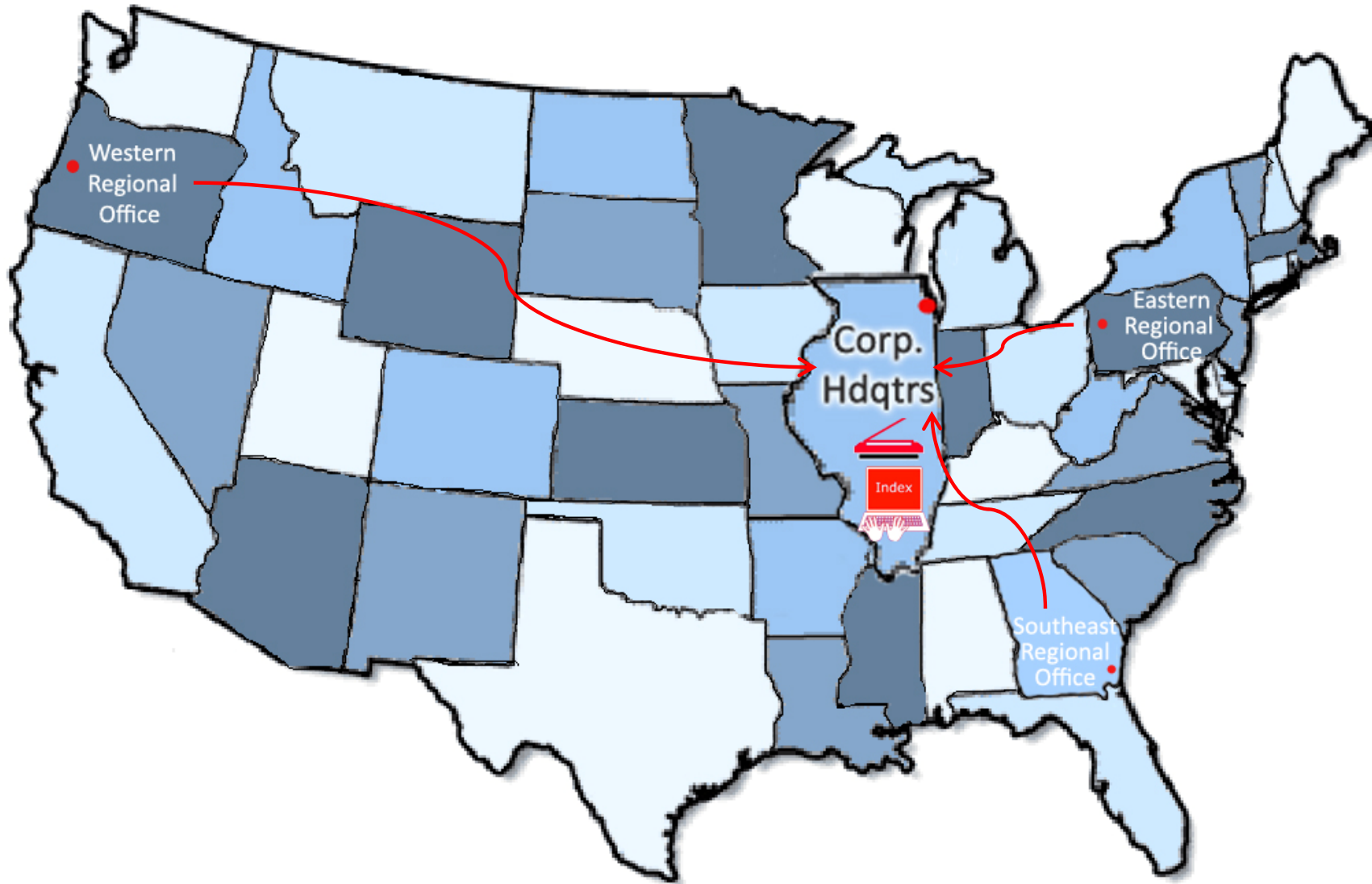
How Can Distributed Capture Streamline Process?

Example: Midwest Company has Chicago headquarters and three regional branch offices, all creating paper documents (Human resources, invoices, contracts, sales orders, correspondence)



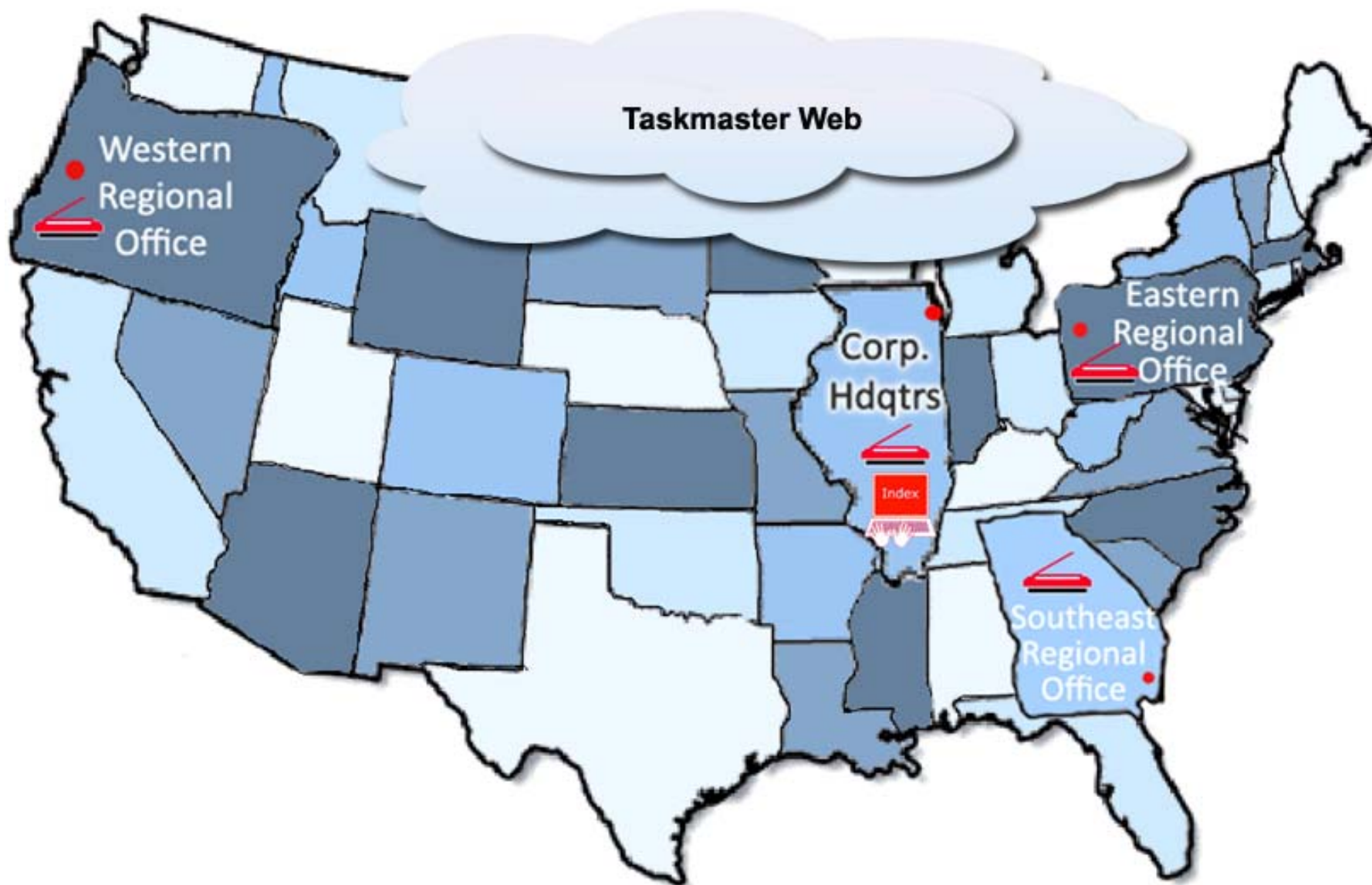
Organization ships paper to headquarters for scanning

Centralized Processing: Business critical documents are sent via overnight mail to headquarters for processing, indexing and storage



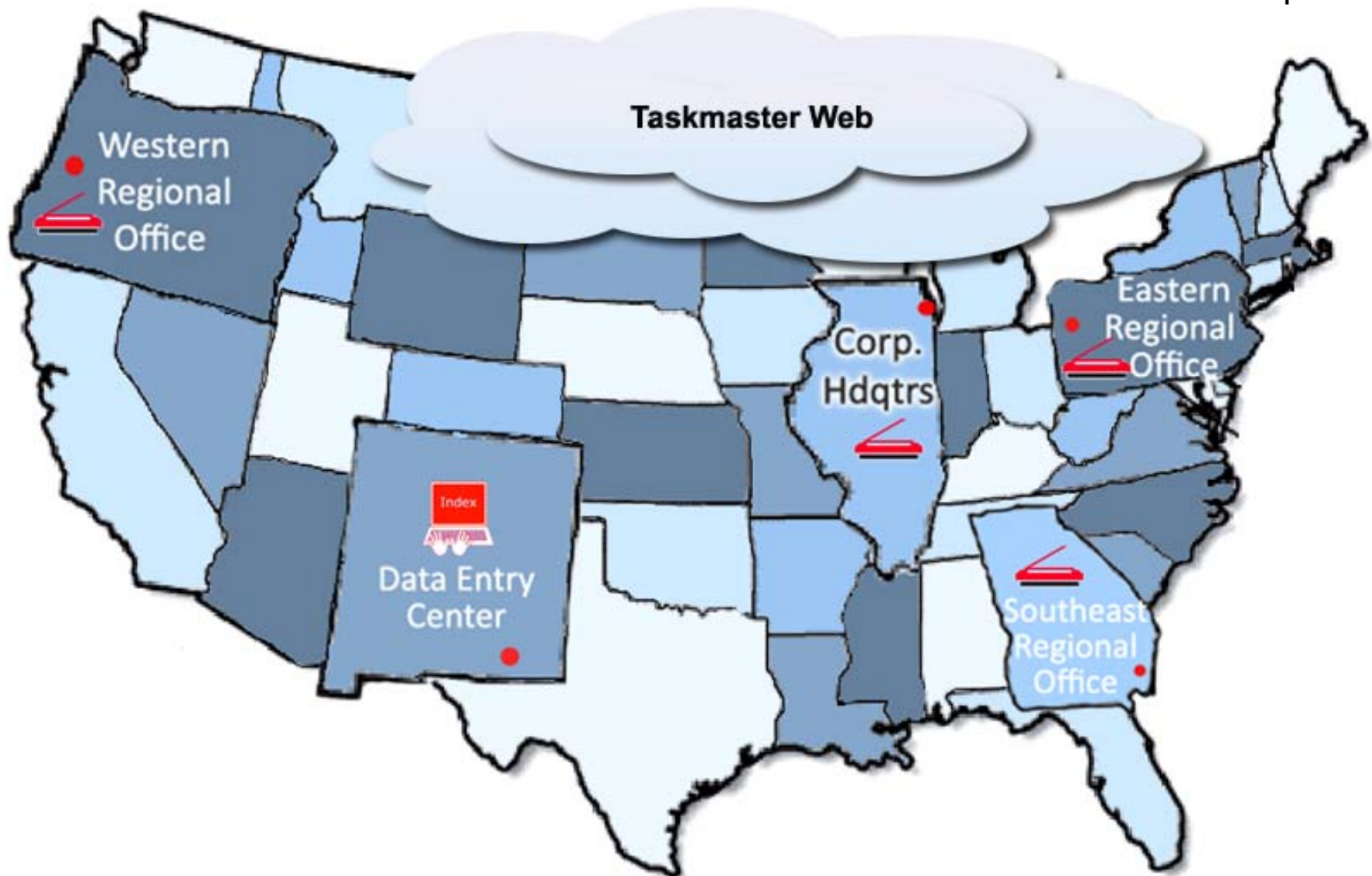
Scanning at the regional centers eliminates document shipping costs

Distributed Scanning: Document images are scanned and uploaded to headquarters in real time over the web, where images are indexed and data extracted



Distributed verification to a low cost processing center further reduces cost

Distributed Verification: Document images are verified via the web and results are applied to images stored at headquarters



Distributed Capture Benefits

- Cost Savings
 - Postage, overnight mail, presorting
 - Documents lost in transit
 - Move work to regions with lower wage rate
- Accelerate Processing Time
 - Immediate scanning and input
- Increase Accuracy
 - People who generate documents have better knowledge
- Project Management
 - Overflow and spikes in volume
 - Migration to new processes

Murphy Hoffman Company Eliminates Shipping Costs

“Now staff at headquarters isn’t waiting until paper arrives to perform their work. They always have work available.” – Imaging Manager, Midwestern Trucking Company



- 65 regional sales and service centers throughout the Midwest
- Installed 65 scanners and Datacap Taskmaster Capture for browser-based scanning
- Scan: Invoices, sales, lease and service documents are scanned as soon as they are generated
- Images uploaded to Kansas City headquarters for processing and storage
- Now documents are available immediately
- Staff at headquarters no longer wait for documents to arrive
- Document shipping expense eliminated
- Customer estimates savings at \$440,000 per year

Virginia Department of Taxation Enables Jobs Statewide

“We realized we could use the thin client to have at-home workers do data entry and verification of returns.”

— Nancy Wilson, Virginia Tax’s Manager of Automated Processing Systems



- Processing 1.5 million paper tax returns every year, scanned in Richmond processing center
- Each captured return is presented to a verify operator who confirms data accuracy and fixes low confidence characters when needed
- Virginia passed a law in 2008 to stimulate jobs in low income areas
- Virginia Tax distributes a percentage of tax returns to At-home workers in low income areas using Datacap Taskmaster Capture’s browser-based verify panel
- Distributed capture helps Virginia deliver on its economic pledge and provides Virginia tax processing staff with maximum flexibility

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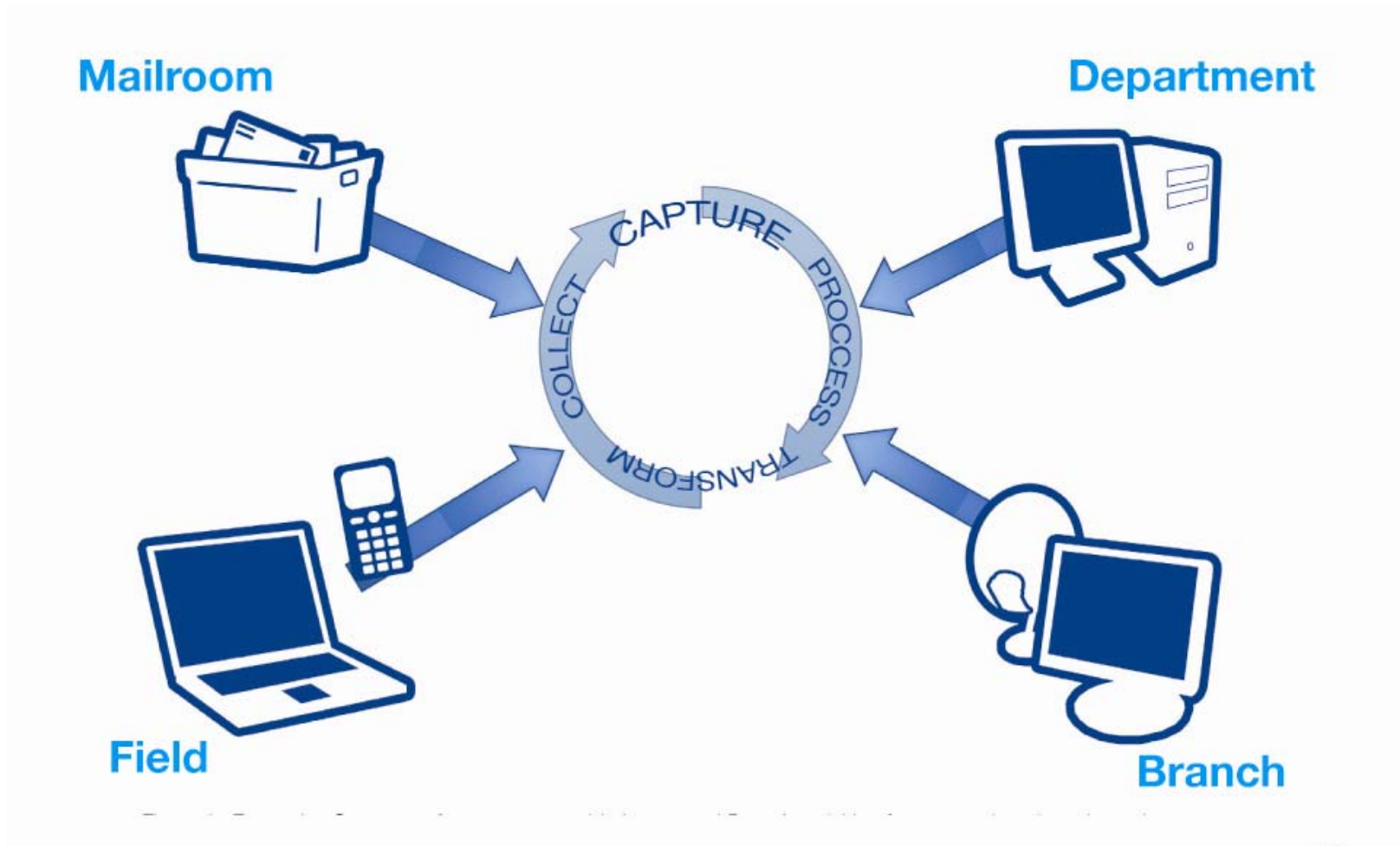
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Enterprise Capture



“Enterprise capture uses common software to capture and extract information from documents enterprise-wide, either for a single business function in multiple locations, or for multiple business functions across the enterprise” - **Business Empowerment Through Enterprise Capture**



Benefits of Enterprise Capture

- **Increased business velocity** from faster automated routing and processing of captured information. Benefits can accrue in any business process that relies on data from unstructured documents
- **Streamlined operations** from “truncating” processes for managing paper by capturing documents as they enter the corporation
- **Better compliance** from immediate classification, indexing, addition of metadata and tracking of documents
- **Reduced security risk** from eliminating the transport of paper documents to centralized centers or service bureaus for capture
- **Cost savings** from the reduced need for data entry, document transportation and document retention
- **More efficient IT management and reduced costs** from consolidated infrastructure and vendor management



BlueCross BlueShield Health Insurer Captures All Documents

"I can see us adding new documents to our capture portal for a very long time."

— Claims Manager, Major BCBS



- Purchased IBM Datacap Taskmaster Medical Claims Capture to automate input of 12,000 paper health claims a day
- Reduced labor by 50% and shrunk turnaround time
- Made a strategic decision to extend capture to other departments
- Began a process of adding one or two departments a year
- Now they are scanning 50,000 documents a day, including:
 - Contracts
 - Enrollments
 - Medical tests
 - Invoices
 - Human Resources
- Added remote scanning from 5 satellite offices
- Added fax capture
- Email and Electronic documents on horizon

Global Logistics Company improves productivity and service

Represents the state of the art for capture today: capturing paper, fax and emails, distributed scanning from many different sites, with many rules-driven variations.

- 150,000 documents arriving every day from mail, fax, email - and piling up rapidly as company prepared customs paperwork for shipments
- Customs has many requirements for complete declaration at border crossing
- Deployed seven imaging applications enabling faster order processing with fewer errors
- Process ~600,000 pages per day in U.S. (~3,000 users) and expect to process ~4 million pages per day (~10,000 users) globally.
- Company is able to move more shipments across borders with 30% less resources
 - Reduced lost documents and data errors
 - Improved cycle times and accuracy



IBM Datacap Taskmaster Capture

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	3.8	3.8	4.0	3.8	4.1	3.8	4.0	4	4
Ease of Roll Out/Scalability	3.8	3.8	4	3.8	4	3.8	3.8	3.8	4
Ease of Configuration/Customization	3.8	3.8	4.0	3.8	4.2	3.8	3.8	3.8	3.7
Security	3.8	3.8	4.0	4	4.3	3.8	4.0	3.8	4.0
Strategy	3.8	3.8	4.0	3.8	4.7	3.8	3.8	3.8	4.0
Stability/Bugs	3.8	3.8	4.0	3.8	4.2	3.8	4	3.8	3.8
Integration	3.8	3.8	4.0	3.8	4.3	3.8	4	4	4
Community and Channel	3	3.8	3.8	3.8	3.9	3.8	3.8	3.8	3.8
Support/Maintenance	3.8	3.8	4.0	3.8	4.2	3.8	3.8	3.8	3.8
Value for Money	4	3.8	4.0	3.7	4.3	3.8	3.8	3.8	4
Standards	3.7	3.8	4.0	3.8	4.3	3.8	4	4	3.8
Application Development	3.8	3.8	4.0	3.8	4.2	3.8	3.8	4	4.0

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

Software Demo

IBM Datacap Taskmaster Capture 8.01

- **Built for Production Document Capture**
 - Central (corporate or mailroom-type)
 - Departmental
 - Branch
 - Network and web-based clients have same functionality
 - Enterprise-ready scalability
- **Rich administration tools**
 - Network and Web-based monitoring and administration
 - Extensive Reporting
- **User based pricing** (not per image or per click)
- **Client can orchestrate their own capture systems**
 - Point and click interface to configure advanced solutions:
 - Input from scanners, MFDs, folders, Fax, email and electronic
 - Document ID and classification - Learns from human operator
 - Data extraction using OCR, ICR, OMR, barcode 1D and 2D
 - Validates data including lookups (and retrievals)
 - Intuitive User Interface for data entry, edit and verification
 - Formats data and image for all target systems

- Accounts Payable
- Claims Processing
- Healthcare
- Insurance
- Government
- Financial Services
- Transportation
- Manufacturing

Browser-Based Scan Panel

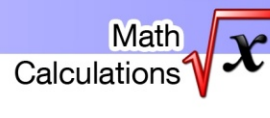
Thick Client Scan Panel

Browser-Based Verify Screen

Thick Client Verify Screen

Administrator Job Monitor

Rulerunner Service

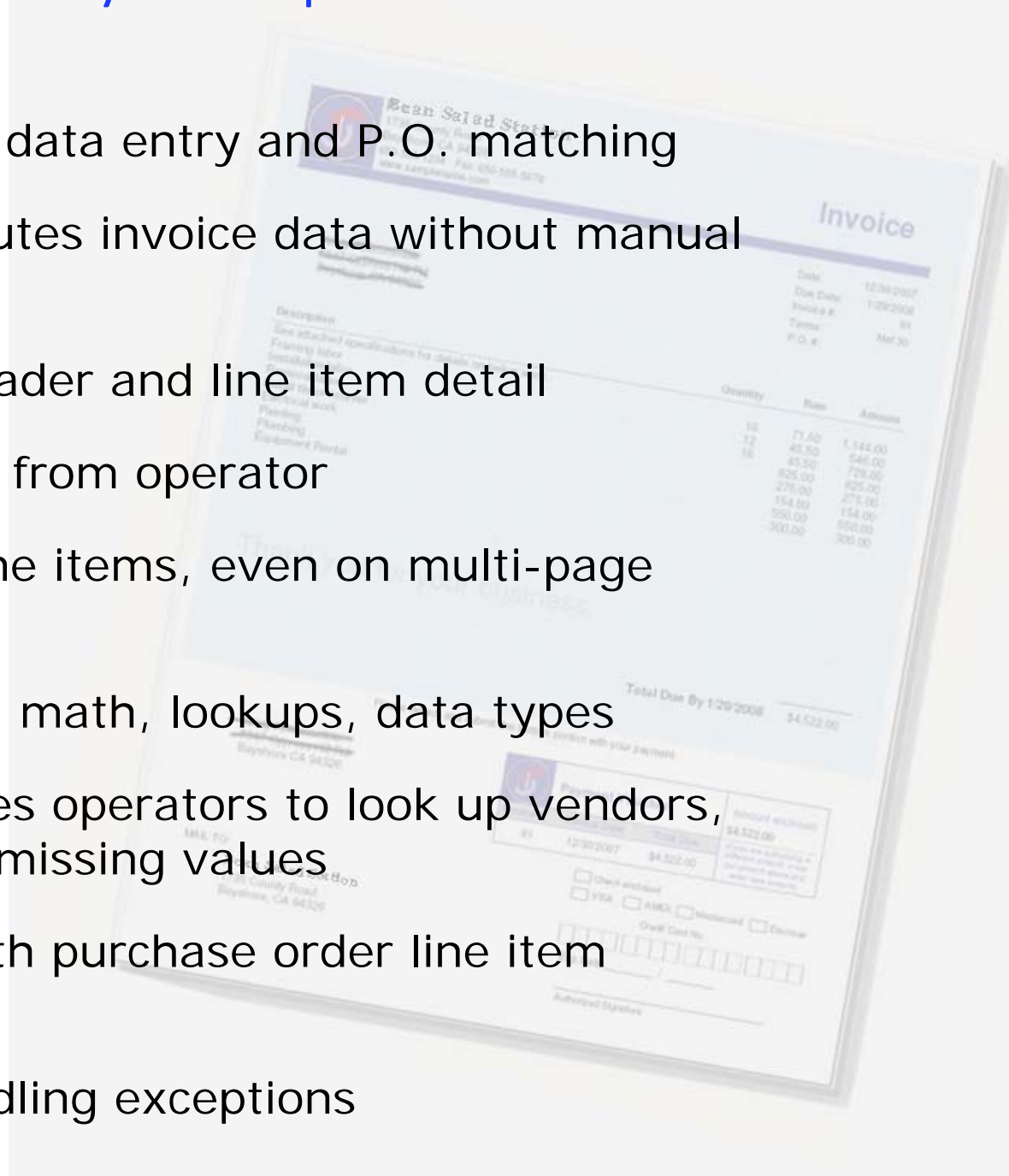


Support for IBM ECM Repositories Standard

- IBM FileNet Content Manager (P8)
 - Tight handoff of data and images
 - IBM Content Manager (CM8)
 - Uploads PDFs or TIFFs
 - IBM FileNet Image Services
 - Uses IBM FileNet IDM Desktop Client
 - IBM Production Imaging Edition
 - One product for the complete lifecycle of imaging from capture to repository to BPM to sophisticated viewer
- Plus...
- IBM FileNet Capture Professional
 - Add automation and thin client distributed capture to existing IBM FileNet Capture installations

Datacap Taskmaster Accounts Payable Capture

- Preconfigured for invoice data entry and P.O. matching
- Captures, verifies and routes invoice data without manual data entry
- Extract data including header and line item detail
- Learns new invoice types from operator
- Accurately captures all line items, even on multi-page invoices
- Validation rules on dates, math, lookups, data types
- Active verify panel enables operators to look up vendors, add line items, calculate missing values
- Aids three-way match with purchase order line item reconciliation
- Send to operator for handling exceptions



Datacap Taskmaster Medical Claim Capture

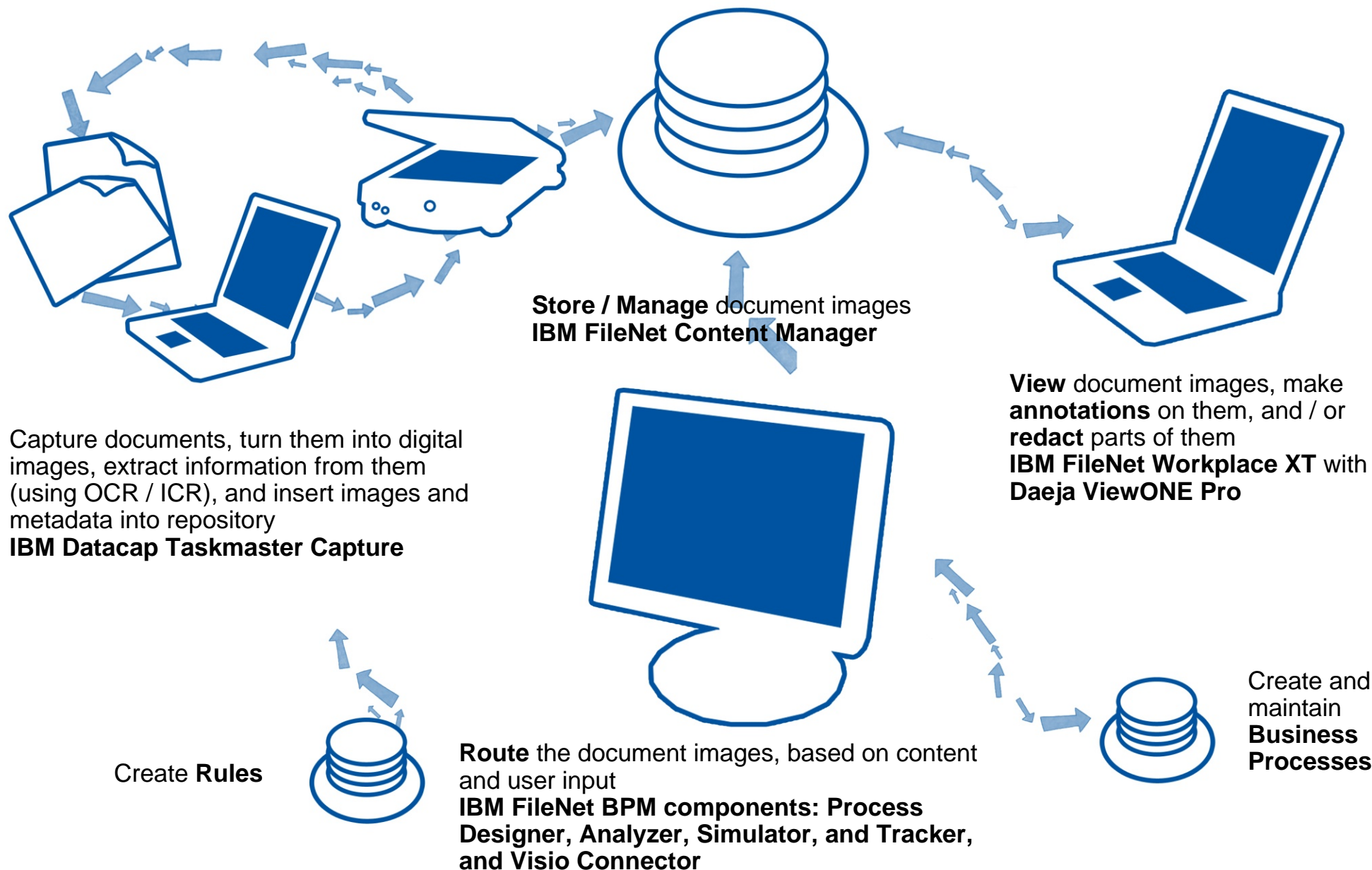
- Capture CMS 1500 medical claims and UB-04 institutional claims
 - Preconfigured capture for 100% of fields on the CMS 1500 (aka “Professional”)
 - Complete capture of all fields on the UB-04 claim (aka “Institutional”)
 - Plus attachments
- Thin Web and thick Windows clients
- Support for black claims
- Validations
 - Lookups – i.e. Match diagnosis and CPT codes
 - Business rules
 - Math calculations
 - HIPAA compliant 837 EDI output
- Claim scanning, verification and application administration and reporting



IBM Datacap Taskmaster Add-on Components

- IBM Datacap Rulerunner Enterprise - for increased performance
 - Support for multi processor systems
 - Server-based Fingerprint processing
- Connectors for eMail and Electronic Documents
 - Access mail server(s)
 - Convert Microsoft Word, Excel, Outlook, PDF, and multipage TIFF files
 - Extract from ZIP files
- Connector for Fax
 - A Fax is an image
- Connectors: EMC Documentum, Microsoft SharePoint and OpenText LiveLink
 - IBM Capture Solutions will support most ECM systems
- Recognition support for major European languages (single-byte, Latin 1-4 code pages)
 - Capture multiple languages on a single document

Production Imaging Edition – The Total Imaging Platform



Q & A