IBM Datacap Taskmaster Capture V8.0 automates full range of document capture processing

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At a glance

IBM® Datacap Taskmaster Capture V8.0 provides:

- Input from scanners and multifunction devices, folders containing image files previously scanned, from thin and thick clients
- Image enhancement and recognition of typed, written, checked box, or bar code data
- Document identification using one or more rule-based techniques
- Automated validations, including database lookups, math calculations, check sum, and so on
- Verification by QA personnel using thin or thick client and delivery to image repository, legacy system, ERP, database, website, or enterprise system

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Overview

IBM Datacap Taskmaster Capture V8.0

Capture begins when IBM Datacap Taskmaster Capture V8.0 acquires images from any ISIS or TWAIN-enabled attached or network scanner, MFP device, or folders containing files that were previously scanned from such devices. The images are then taken through an optimization process to increase the accuracy of data recognition. Classification is performed to identify the document type using a variety of technologies including our unique fingerprinting. Once the document type is known, Taskmaster locates and extracts data from a document, including machine print, hand print, bar code, or check boxes. The data goes through a validation process using database lookups, math calculations, inter-field comparisons, and various other calculations using more than 150 preconfigured actions. The document image and data may then be presented to an operator for verification and any correction. Data may also be entered by the operator, a process called key from image. The images and appropriately formatted data are delivered to FileNet® P8. Capture processing is performed quickly, cost-effectively, and within the accuracy parameters the user establishes.

Taskmaster Rulerunner Service, the SOA-compliant rules-based processing engine in Taskmaster, provides control over the entire capture process. Using rules, capture can be tailored to fit demanding business requirements and can be changed quickly when the business requirements or technical environment changes. A large library of prescripted procedural rules is easily assembled into a hierarchy of rule sets using

a graphic tool, without programming. The rules-driven architecture of Taskmaster can help you with fast implementation, low service costs, great flexibility, and easy administration.

IBM Datacap Taskmaster Capture features a robust and scalable three-tier client/ server architecture. Taskmaster web client provides the third tier, a thin-client implementation for browser-based scanning, verification, and administration. Deployment may be a combination of centralized thick clients and remote thin clients. For example, scanning may be performed remotely where the documents originate, such as a branch office or affiliate locations, while verification of the captured index data might be performed at a central location. Scanning documents at their point of origin can increase efficiency, speed input, and reduce the cost of shipping documents. Distributing the verification process to at-home workers or remote locations can increase the efficiency of your workforce. And the ability to administer a Taskmaster system from any location at any time has many benefits to IT personnel.

Key advantages

- Flexible rules provide users with easy configuration and adjustment of the entire capture process
- Capture independence whether it's best-of-breed recognition engines, SOA, ECM, databases, or scanners, Taskmaster provides the freedom to choose how these capabilities can be deployed and used
- Integrated local and distributed capture provides flexibility to support the best business results
- Cost of ownership with easier, less costly configuration and management, and no per click charges; IBM Datacap Taskmaster can provide a fast return on your investment

Key prerequisites

- Installs and runs on either a single Microsoft® Windows-based machine or multiple machines in a client/server environment
- Microsoft Access, SQL Server, or an Oracle database for use by Taskmaster
- Scanner support of either TWAIN or ISIS drivers or access to previously scanned images

Planned availability date

December 10, 2010: Electronic availability

December 17, 2010: Media availability

Description

IBM Datacap Taskmaster Capture enhances current IBM capture capabilities for FileNet P8. It supports distributed and centralized capture implementations to meet the needs of document capture for small, medium, and large enterprises.

Taskmaster Capture can help significantly reduce labor and paper costs, and help you deliver meaningful information for better and faster decisions, driven by these key value components:

- FTE reduction or repurposing
- Data entry error reduction
- Elimination of document transportation costs
- Accelerated document processing

New capabilities provided by Taskmaster Capture V8.0 include an architecture that centralizes application settings, a browser-based report viewer with dashboards, and enhanced rules-based application monitoring. Increased AP automation is provided with Purchase Order Line Recognition (POLR) in Taskmaster Accounts Payable Capture.

Features

- Vertical Applications for accounts payable invoice processing
- A rules-based architecture for control over the entire capture process, without complex programming
- Rules are extensible and easy to create in either .NET or VB Script
- Taskmaster Fingerprinting for fast, accurate document identification without setting up templates
- Scalable architecture by adding additional servers, clients that can support capture processing of several hundred thousand document pages per day
- Built-in integration with FileNet P8
- Choice of best-of-breed recognition engines to best fit specific needs
- Full range of document identification:
  - Manual by operator
  - Bar code on document
  - Separator sheets (with or without bar code)
  - Pattern recognition on document (logos, images, text)
  - Keywords on document
  - Fingerprinting
- Rules-configurable validations including database lookups, interfield calculations, and math checks
- Taskmaster Flex for rapid indexing of documents with no need to configure rules or workflow
- Browser-based remote scanning, verification, and administration
- True 3-tier client/server architecture with thick- and thin-client architectures seamlessly integrated
- Leveraging existing standards including COM, sockets, ODBC, OLE DB, HTTP, .NET, and service-oriented architecture (SOA)

Common document processing steps include:

- Input from scan or existing image archive
- Document ID and classification
- Image enhancement
- Recognition of typed, written, checked box, or bar code data
- Automated validations, including database lookups and retrieval, math calculations, check sum
- Verification by QA personnel
- Delivery to FileNet P8

Every organization has unique document processing requirements, business rules, and industry regulations. Taskmaster is a flexible platform that offers best-of-breed capture capabilities. Users configure applications with Datacap Studio which enables you to build simple or extremely complex capture workflows using a point-and-click interface. Rulerunner Service, which is included in Taskmaster Capture, executes these rules. No other capture platform offers the flexibility and adaptability of IBM Datacap Taskmaster. Hundreds of Datacap rules can be selected to manage the entire data entry process, thereby eliminating any potentially costly programming and extended Professional Services engagements. This is why Taskmaster can help lower your total cost of ownership.

For additional information on IBM Datacap Taskmaster Capture V8.0, visit

http://www.ibm.com/software/data/content-management/datacap/taskmaster-capture/

Accessibility by people with disabilities

A U.S. Section 508 Voluntary Product Accessibility Template (VPAT) can be requested via the IBM website

http://www.ibm.com/able/product_accessibility/index.html

Product positioning

IBM Datacap Taskmaster Capture is used in a wide variety of industries including financial services, insurance, corporate accounts payable, government, healthcare, transportation, and publishing. Customer applications capture mortgage documents, applications, invoices, tax returns, tax documents, public safety documents, registrations, custom documents, broker orders, and other documents. A prepackaged application for processing invoices can provide faster ROI and reduced services requirements. Taskmaster enables organizations to quickly and easily capture and extract key information from documents and convert the documents to images that are stored electronically.

A complete end-to-end capture solution

IBM Datacap Taskmaster Capture V8.0 reduces labor and paper costs while increasing data accuracy and accelerating document processing by automating the capture of documents from scanners, MFP devices, as well as previously scanned images in local or network folders. Direct integration with FileNet P8 provides a complete platform for centralized, departmental and distributed capture for the enterprise.

Simplified packaging

IBM Datacap Taskmaster Capture offers several comprehensive packages to address your capture requirements. The base capture package provides all the necessary client, server, and image processing and recognition software necessary for automatic capture of machine print, hand print, optical marks such as check boxes and bar code data from any document type with delivery to IBM FileNet P8. Another package provides preconfigured support for capture of accounts payable invoices. Streamlining capture for these applications provides customers with significant cost savings, reduced errors, and faster processing.

Rules-based architecture

Taskmaster's unique rules-driven architecture provides control over the entire capture process from scanning and image processing, to validations and formatting for export. Other capture products only provide rules for validations. With Taskmaster, every capture processing step may be customized to meet business requirements. And with deployment across centralized thick clients and remote thin clients, customers are provided implementation flexibility that can help increase efficiency, speed input, and reduce the costs of shipping.

Scalable to support high document volumes

Taskmaster provides a true client/server architecture that provides multiple approaches to achieve scalability, which can be used in various combinations. Features such as automatic document identification and automatic indexing support high volume scanning, quickly delivering information to imaging and content management systems. The Rulerunner Service provides core capture capabilities decoupled from the Taskmaster capture platform. As volumes increase, scaling becomes easier through the use of additional Rulerunner Services to handle

increased workloads. Distributed capture further enables scaling by adding remote capture locations.

Program number

Program number	VRM	Program name
5725-C15	8.0.0	IBM Datacap Taskmaster Capture

Offering Information

Product information is available via the Offering Information website

http://www.ibm.com/common/ssi

Also, visit the Passport Advantage® website

http://www.ibm.com/software/passportadvantage

Publications

No publications are shipped with this product.

The IBM Publications Center

http://www.ibm.com/e-business/linkweb/publications/servlet/pti.wss

You can download the PDF publication and find associated content for IBM Datacap Taskmaster Capture from the V8.0 library page, which is available at General Availability.

http://www.ibm.com/support/docview.wss?uid=swg27020296

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Technical information

Specified operating environment

Hardware requirements

Below are guidelines for the minimum hardware recommended to operate Taskmaster. Configurations that exceed these recommendations should result in better performance.

Station Type	CPU/equiv	RAM (GB)	Available Disk (GB)	Network (MBS)
Taskmaster Server/File Server	Intel® Core 2 Duo T7500 (2.20GHz) AMD Opteron, Athlon or	3	100(fast)	100

	Sempron			
Taskmaster Web Server	Intel Core2 Duo E6850 (3.0GHz) AMD Athlon or Sempron	4	80	100
Rulerunner Service	Intel Core2 Duo E6850 (3.0GHz) AMD Athlon or Sempron	2	80	100
Scan Station	Pentium® Dual Core E2160 (1.80GHz) AMD Athlon or Sempron	1	10	100
Verification Station	Pentium Dual Core E2160 (1.80GHz) AMD Opteron, Athlon or Sempron	1	10	100

Notes:

1. A file server is required to store the images and intermediate processing files. The Taskmaster server can be the same computer as the file server. The storage space needed on the file server is dependent upon image size and volume.
2. The Taskmaster web server components can run on the same computer as Taskmaster server components in a secure configuration (Intranet, VPN, and so on).
3. Rulerunner stations provide all unattended processing, including document identification, recognition, image processing, validations, and export of data.
4. Taskmaster web stations should run Microsoft Internet Explorer 6.0, or higher. (Firefox is supported with limitations.)
5. Network is assumed to be Ethernet with TCP/IP running Microsoft file servers.

Software requirements

IBM Datacap Taskmaster Capture V8.0 requires either a single Windows-based machine or multiple machines in a client/server environment. Taskmaster supports Windows®: XP SP3 (32-bit); Windows 2003 SP1 (32-bit); Windows Server 2008 (32-bit and 64-bit); and Windows 7 (32-bit and 64-bit). Servers need to run Windows 2003 or Windows 2008 Server O/S.

Notes:

1. All computers running a Taskmaster application must use the same version of Taskmaster. Operating Taskmaster Client or Taskmaster Web with an incompatible version of Taskmaster Server, or allowing different versions to access one database, can result in loss of data.
2. Servers and Workstations running Datacap software require Microsoft.NET Framework 2.0 and 3.5, if not already installed, will be installed automatically during the Datacap software installation process.
3. Servers running Taskmaster web components require Microsoft Internet Information Services (IIS).
4. Taskmaster Web running in 64-bit Windows requires a .NET application pool configured to permit 32-bit applications. Consult the Installation and Configuration Guide for details.
5. Taskmaster software requires the Microsoft MSXML 6.0 Parser and if it isn't already installed, it will be installed automatically during the software installation process.

6. Taskmaster requires the Microsoft Windows Installer 3.1. If it isn't already installed, it will be installed automatically during the Datacap software installation process.
7. Taskmaster web verification stations should run Microsoft Internet Explorer 6.0, or higher.

Supported databases

Taskmaster applications are preconfigured to use Microsoft Access for the three primary databases which store administration, batch, and rules information. The use of Oracle and SQL Server is supported and strongly recommended for enterprise or mission-critical applications.

Supported scanners

ISIS drivers are supported with Taskmaster thick clients. TWAIN drivers are used for Taskmaster Web remote scan clients.

Datacap has two levels of scanner support: Compatible, Certified.

The program's specifications and specified operating environment information may be found in documentation accompanying the program, if available, such as a README file, or other information published by IBM, such as an announcement letter. Documentation and other program content may be supplied only in the English language.

Planning information

Customer responsibilities

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IBM includes one year of Software Subscription and Support (also referred to as Software Maintenance) with each program license acquired. The initial period of Software Subscription and Support (also referred to as Software Maintenance) can be extended by the purchase of a renewal option, if available.

Security, auditability, and control

Datacap Taskmaster Capture uses the security and auditability features of the host software.

The customer is responsible for evaluation, selection, and implementation of security features, administrative procedures, and appropriate controls in application systems and communication facilities.

Ordering information

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Product information

Licensed function title	Product group	Product category
IBM Datacap Taskmaster Accounts Payable Capture Authorized per UVU	Datacap	Datacap AP Capture
IBM Datacap Taskmaster Accounts Payable Capture Employee per UVU	Datacap	Datacap AP Capture
IBM Datacap Taskmaster Capture Authorized per UVU	Datacap	Datacap Capture
IBM Datacap Taskmaster Capture Employee per UVU	Datacap	Datacap Capture

Program name	PID number	Charge unit description
IBM Datacap Taskmaster Accounts Payable Capture Authorized per UVU	5725-C15	Per User Value Unit
IBM Datacap Taskmaster Accounts Payable Capture Employee per UVU	5725-C15	Per User Value Unit
IBM Datacap Taskmaster Capture Authorized per UVU	5725-C15	Per User Value Unit
IBM Datacap Taskmaster Capture Employee per UVU	5725-C15	Per User Value Unit

Charge metrics definitions

User Value Unit (UVU)

UVU is the metric by which this program is licensed. UVU entitlements are based on the number of users for the given program. A Proof of Entitlement (PoE) must be obtained for the appropriate number of UVUs required for your environment as defined by the specific program terms. The UVU entitlements are specific to the program and may not be exchanged, interchanged, or aggregated with UVU entitlements of another software program. UVU licensing offers you price benefits for customers by enabling a lower cost of incremental growth of resources. To understand these benefits of UVU licensing, and to determine how many UVUs to obtain for the program, contact your IBM representative.

Passport Advantage program licenses

Datacap Taskmaster Capture

Part description	Part number
IBM Datacap Taskmaster Accounts Payable Capture Employee per UVU	
IBM Datacap Taskmaster AP Capture Employee User VU Annual SW S&S Rnwl	E0AXRLL
IBM Datacap Taskmaster AP Capture Employee User VU Lic + SW S&S 12 Mo	D0H4KLL
IBM Datacap Taskmaster AP Capture Employee User VU SW S&S Reinstate 12 Mo	D0H4LLL

Datacap Taskmaster Capture

Part description	Part number
IBM Datacap Taskmaster Accounts Payable Capture Authorized per UVU	
IBM Datacap Taskmaster AP Capture Authorized User VU Annual SW S&S Rnwl	E0AXQLL
IBM Datacap Taskmaster AP Capture Authorized User VU Lic + SW S&S 12 Mo	D0H4ILL
IBM Datacap Taskmaster AP Capture Authorized User VU SW S&S Reinstate 12 Mo	D0H4JLL

Datacap Taskmaster Capture

Part description	Part number
IBM Datacap Taskmaster Capture Employee per UVU	
IBM Datacap Taskmaster Capture Employee User VU SW S&S Reinstate 12 Mo	D0H4SLL
IBM Datacap Taskmaster Capture Employee User Value Unit Annual SW S&S Rnwl	E0AXULL
IBM Datacap Taskmaster Capture Employee User Value Unit Lic + SW S&S 12 Mo	D0H4RLL

Datacap Taskmaster Capture

Part description	Part number
IBM Datacap Taskmaster Capture Authorized per UVU	
IBM Datacap Taskmaster Capture Auth User Value Unit Lic + SW S&S 12 Mo	D0H4PLL
IBM Datacap Taskmaster Capture Auth User Value Unit SW S&S Reinstate 12 Mo	D0H4QLL
IBM Datacap Taskmaster Capture Authorized User Value Unit Annual SW S&S Rnw	E0AXTLL

Passport Advantage supply

Program name/description	Part number
Datacap Taskmaster Capture V8.0.0	
Datacap Taskmaster Capture Windows 7 Professional,Windows 7 Ultimate,Windo	BB00KEN

Passport Advantage customer: Media pack entitlement details

Customers with active maintenance or subscription for the products listed are entitled to receive the corresponding media pack.

Datacap Taskmaster Capture V8.0.0

Entitled maintenance offerings description	Media packs description	Part number
IBM Datacap Taskmaster Accounts Payable Capture Authorized per UVU	Datacap Taskmaster Capture Windows 7 Professional,Windows 7 Ultimate,Windo	BB00KEN
IBM Datacap Taskmaster Accounts Payable Capture Employee per UVU	Datacap Taskmaster Capture Windows 7 Professional,Windows 7	BB00KEN

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                              Ultimate,Windo
IBM Datacap Taskmaster        Datacap Taskmaster Capture   BB00KEN
 Capture Authorized per UVU   Windows 7
                              Professional,Windows 7
                              Ultimate,Windo
IBM Datacap Taskmaster        Datacap Taskmaster Capture   BB00KEN
 Capture Employee per UVU     Windows 7
                              Professional,Windows 7
                              Ultimate,Windo
```

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This software license includes Software Subscription and Support (also referred to as Software Maintenance).

License Information form number(s)

```
Program name                            Program    Form number
                                        number

Datacap Taskmaster Capture              5725-C15   L-PLES-896TJU
```

The program's License Information will be available for review on the IBM Software License Agreement website

   http://www.ibm.com/software/sla/sladb.nsf

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Yes

Limited warranty

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