

# Accelerated case management with IBM Datacap

*Optimize business outcomes for customers and citizens by unifying information, processes and people*



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## Highlights

- Enable document capture from multiple sources using commonly available equipment such as mobile devices, multifunction devices and scanners
  - Quickly process trailing documents directly from IBM® Case Manager
  - Automate and streamline document processing, data extraction and validation to help improve accuracy and reduce manual errors
  - Gain a complete view of the customer for increased employee productivity and deeper customer engagement
  - Securely collaborate with internal and external parties to accelerate the time to close a case and improve business outcomes
  - Record and package all actions and decisions to support compliance and auditing
  - Accelerate time to value and easily scale as needed with cloud
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Organizations know that faster and more accurate processing of documents results in better case management execution. But gathering and managing case-related documents from all channels—including email, fax, mobile devices and paper forms—can be a daunting task. Without efficient document processing methods, customer service can suffer, business processes lag and proving compliance with regulations becomes a challenge. By automating document acquisition as part of case processing applications, organizations can lower costs, improve staff efficiency and provide enhanced compliance and auditing.

## Streamline content-based processes with IBM case management and capture solutions

Documents are the lifeblood of many businesses. They contain critical information that enables workers to perform tasks to produce successful business outcomes. Document capture has evolved far beyond scanning paper and now encompasses processing of digital documents from different sources, including email, fax, mobile and multifunction peripherals (MFPs). However, many companies still struggle to provide users with an efficient means to capture and process incoming documents and support real-time business results.



Now, organizations can accelerate their business processes and optimize outcomes by employing case and capture solutions from IBM. By enabling workers to use common office equipment such as MFPs, smartphones and tablets to capture documents as they arrive, the IBM solutions help streamline content-based business processes.

Applying IBM case and capture solutions together opens a world of possibilities for accelerating document-centric workflows. For example, organizations can configure business processes to create and start a new case automatically when specific documents arrive. No longer must organizations or their customers wait to start a case while documents are shipped to a central location for scanning and processing.

Here is how the IBM solutions work together to streamline case management: IBM Datacap identifies the incoming document type, regardless of the source, and can determine whether documents are missing pages or required data such as signatures. It can also extract important information from the document to use when initiating a new case or adding to an existing case. These incoming documents can automatically trigger events and activities in IBM Case Manager.

For example, if a trailing form arrives by email, Datacap processes it and extracts unique identifiers, such as a customer number, and automatically adds the document to the case. Workers can then use the information to take the next best action.



### Case in point: Union Bank accelerates ROI with IBM ECM

Many organizations have accelerated case management and improved efficiency across departments for significant performance improvement. Union Bank implemented an integrated IBM solution for case management and document capture and realized big gains by making digital images accessible within the context of a business activity or customer interaction. To learn how Union Bank benefited from the integrated IBM approach, watch the video at <https://ibm.biz/Bd4vit>

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## Reap the benefits of integrated case management and document capture

Accelerating case management with integrated capture means your employees can share pertinent information quickly and securely as it enters your system. Caseworkers can get near-immediate access to timely, accurate and complete information, in context, enabling them to complete their work efficiently.

Digitizing document information also allows organizations to enhance security and compliance around business processes. Local copies, or so-called “convenience copies,” are no longer needed because employees have universal access to the digital documents. Organizations can support compliance and auditing with secure permissions and access logs. They can accurately track who viewed or updated a particular document and when. They can also easily make digital documents subject to lifecycle governance policies, which enhances compliance through data retention regulations, helps lower risk and helps protect customer information.

Moreover, IBM case and capture solutions integrate with Box, empowering knowledge workers to securely collaborate around content with people inside and outside of their organization. They have access to the information they need, no matter where it is located, to take control and act decisively. All of the components work together, forming a comprehensive solution that helps you automate and simplify processes, reduce costs and increase productivity—and make life more convenient for your customers.

## Why IBM?

IBM ECM solutions help you get the right content to the right people at the right time, wherever they are. They can provide a 360-degree view of your customers so you can turn content into insight from the very beginning. IBM case and capture solutions integrate with Box’s secure cloud collaboration, giving organizations enterprise-level functionality with the usability, flexibility and scalability of the cloud. Whether you choose to deploy on premises or in the cloud, IBM ECM solutions empower you to put customers at the center of your business processes.

Gartner has named IBM a leader in its Magic Quadrant for Enterprise Content Management, reflecting IBM’s extensive capabilities in this area. To learn why Gartner ranks IBM as a leader and see how you can gain strategic advantage by taking greater control of your content, read the report at <https://ibm.biz/Bd4vjB>

## For more information

To learn more about Datacap products and solutions, contact your IBM representative or visit: [ibm.com/datacap](https://ibm.com/datacap)

To explore the IBM Datacap on Cloud marketplace, visit: [ibm.com/marketplace/cloud/document-capture-and-imaging/resources/us/en-us](https://ibm.com/marketplace/cloud/document-capture-and-imaging/resources/us/en-us)

To explore the IBM Case Manager on Cloud marketplace, visit: [ibm.com/marketplace/cloud/advanced-case-management/us/en-us](https://ibm.com/marketplace/cloud/advanced-case-management/us/en-us)



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