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## Highlights

- Accelerate business processes, enhance efficiency and help reduce costs by implementing intelligent data capture as part of an integrated digital business automation (DBA) platform
  - Capture more actionable insights by understanding, categorizing and analyzing a broad range of documents
  - Protect information and comply with regulations by detecting and redacting sensitive data automatically
  - Improve decision-making and gain a competitive advantage by generating new insights from unstructured data
  - Increase agility with flexible deployment options
  - Leverage capture as part of a comprehensive DBA strategy to help scale operations, improve the customer experience and revenue per employee, and enhance quality of work
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# IBM Datacap Insight Edition

*Use cognitive capture to understand and deliver content at the speed of business*

Organizations collect, process and store a tremendous volume and variety of data. Unstructured data, ranging from correspondence to email messages and digital files, represents approximately 90 percent of that information.<sup>1</sup> Whether evaluating loan applications, processing insurance claims or managing shipping invoices, human intervention is often needed to review and make sense of that unstructured data. Unfortunately, this type of handling is usually slow, costly and error-prone.

Cognitive capture solutions—which can understand, reason and learn—make it easier to extract valuable information from unstructured documents. These solutions can quickly turn data into information needed for identifying patterns and generating new insights. As part of business automation platforms, they play a vital role in driving digital transformations that help accelerate business processes while improving efficiency and the customer experience.

IBM is leading the way in cognitive computing with solutions such as IBM® Datacap Insight Edition that are fully integrated with digital business automation (DBA) platform capabilities such as tasks, content management, workflow and decision-making support. The IBM DBA platform provides automation benefits to help clients scale operations, improve the customer experience, increase revenue per employee and enhance quality of work.



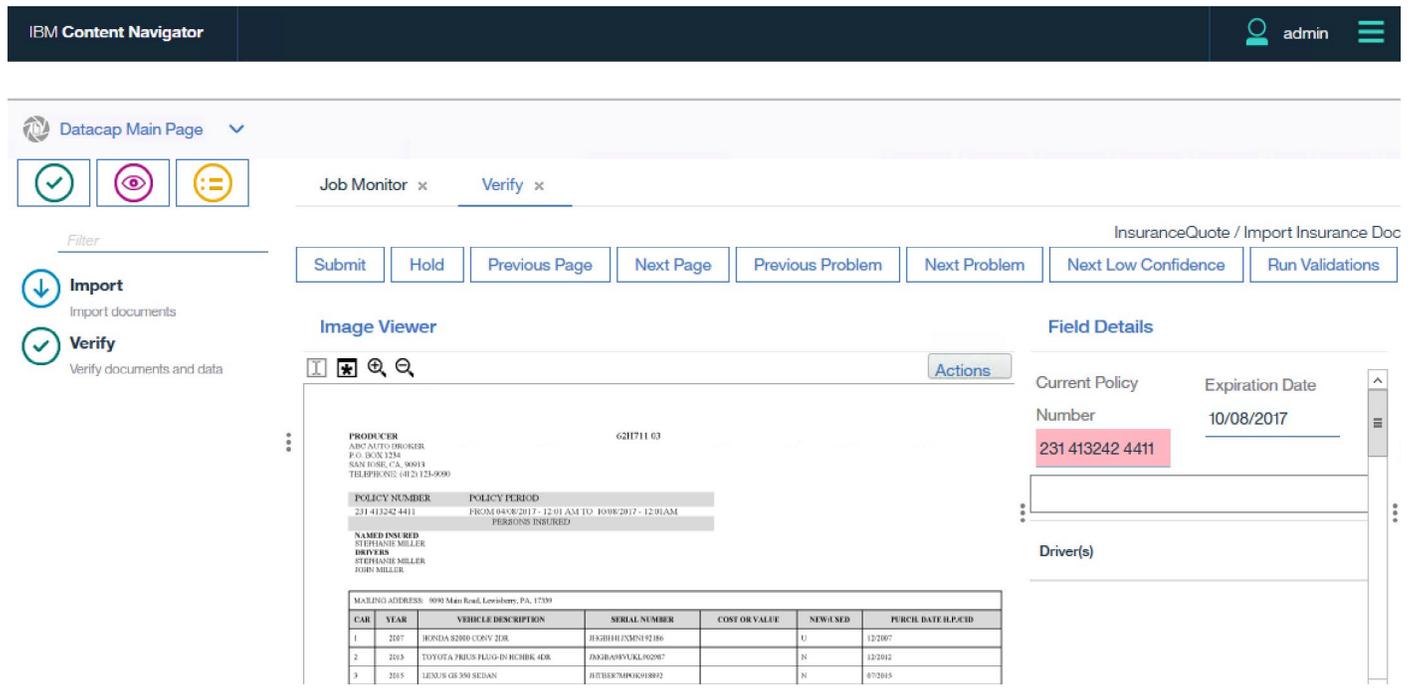


Figure 1. Datacap Insight Edition cognitive capture capabilities can help streamline a wide range of workflows, such as providing an insurance renewal quote.

Datacap Insight Edition uses advanced cognitive computing capabilities to go beyond the limits of traditional capture solutions. It applies advanced imaging, text analytics, natural language processing and machine learning technologies to automatically find, extract and classify important information from complex and variable documents including both digital text and visual content/images. Extracting information and insights from any and all of these data types can be critical to business success. Automating the capture of data from files at the point they enter the organization extracts relevant information at a speed beyond that of a human.

### Understand your documents

Datacap Insight Edition helps automate the processing of unstructured documents by performing multiple levels of analysis. First, it examines the structure and layout of each document to recognize the document type—it can distinguish an invoice from a letter, and a contract from an expense claim.

Datacap Insight Edition can then connect to IBM Watson® technologies to apply reasoning, logic and context-sensitive analysis to identify, extract and classify information.

- **IBM Watson Natural Language Understanding** helps identify entities and contextual relationships in extracted texts as they relate to a specific industry. Datacap Insight Edition populates field data using results obtained from Watson Natural Language Understanding.
- **IBM Watson Natural Language Classifier** expands Datacap classification capabilities, identifying the type of documents and classifying paragraphs and phrases.
- **IBM Watson Visual Recognition** enables recognition and understanding of images using deep machine learning algorithms. Organizations can identify a wide array of incoming images and document types, from a photo of a damaged car to pages of loan applications (Figure 1).

Text analytics can also extract nuanced information such as sentiment scores. Sentiment analysis provides information about the tone of the document such as positive, negative and neutral, which in turn offers additional context. Using a traditional capture approach, this sort of information would be lost without a human review. With a cognitive capture solution, however, it becomes part of the information available for use in determining the next best course of action.

The value of Datacap Insight Edition extends to the millions of business documents you may be storing in content repositories. Each document might contain valuable, difficult-to-access information. Datacap Insight Edition can process these stored documents to extract information, augment index information, convert old files to newer searchable formats and provide data to analytics engines. The result: new insight from old data to improve efficiency, employee productivity and business agility.

### Comply and protect

Datacap Insight Edition also helps reduce compliance risks—a top reason why many organizations currently invest in enterprise content management (ECM) solutions.<sup>2</sup> To comply with strict regulations, organizations must implement end-to-end security practices, follow retention and disposal policies, and help ensure that sensitive information remains tightly secured. Some organizations might be subject to fines and lawsuits if they fail to adequately secure documents that contain sensitive or personal information, such as government ID numbers or credit card numbers. Datacap Insight Edition can automatically identify such private and sensitive information using text analytics and protect it with redaction to aid in compliance with industry regulations.

When a document is stored in IBM Content Foundation, Datacap Insight Edition registers each piece of sensitive information with a redaction reason. When a user retrieves the document, redactions are “burned in” according to the user’s role; users see only the information they need to see.

Content Foundation stores only a single copy of the document, so fewer copies of documents with sensitive information are circulated within the organization. By automating redaction instead of leaving the task to individuals, Datacap Insight Edition further increases data security and helps reduce compliance risks.

### Act and deliver

Datacap Insight Edition can help you generate better insights and act on them faster than before. By automating document processing for complex unstructured documents, Datacap Insight Edition enables rapid, accurate, straight-through processing of more documents. Providing fast access to a rich collection of information enables you to produce accurate, reliable insights at the speed of business.

Datacap Insight Edition can also help you accelerate a variety of vital business processes such as claims and correspondence processing, employee onboarding and card applications. By combining Datacap Insight Edition with robotic process automation (RPA), you can streamline tasks while reducing the time, risks and costs associated with manual labor.

Once you’ve identified, extracted and classified information with Datacap, you can use RPA software to enter data into enterprise resource planning (ERP) systems, make address changes, validate credentials or carry out other repetitive or labor-intensive tasks. You can also apply rules to determine whether a document and its data should be stored in a content repository, passed to a case management system to initiate or add to a case, or sent to another line-of-business system.

By automating delivery of data to people and systems, Datacap with RPA can help drive digital transformation across the entire enterprise. It can record and automate repetitive human tasks to streamline mundane work, eliminate copy-and-paste and data entry errors, and free up employees to do higher-value work.

## Cognitive capture can address industry-specific needs

### Financial services

Retail banks can improve decision-making and customer service by using cognitive capture to quickly and accurately process documents such as trade settlements, loan packages, account closing letters and change notifications. Commercial banks can increase productivity and precision by eliminating cumbersome paper processes and enabling automated validations that assist with sanction-checking in the documentary trade process.

### Healthcare

Cognitive capture enables healthcare providers to correlate content from multiple sources so they can accurately process patient admitting, monitor drug interaction information and summarize content from caregiver notes and images to facilitate efficient care collaboration.

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### IBM Datacap Insight Edition—available on the cloud

- **Accelerate adoption** of distributed capture capabilities, including mobile capture
  - **Adopt a fully managed and ready-to-go capture platform** so you can focus on your business
  - **Support advanced capture capabilities** without capital expense barriers
  - **Scale** to match fluctuating customer demand
  - **Continuously leverage** a secure, monitored infrastructure
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### Insurance

To help accelerate claims, underwriting and key decision-making processes, cognitive capture allows insurance companies to analyze content arriving from many sources and in unstructured formats such as dispute letters, claims, images, statements and accident reports.

### Government

Agencies can use cognitive capture to efficiently process a large volume and variety of incoming documents and support fast and exact processing of citizen onboarding, benefit enrollments, Freedom of Information Act requests and contracting.

### Cross-industry examples

- **Human resources:** Cognitive capture can help administrators quickly process unstructured documents for hiring, employee benefits enrollment and employee services.
- **Finance:** Finance teams can augment risk management decision-making; help ensure compliance with anti-money laundering and other regulations; and improve the speed and accuracy of processing contracts.
- **Transportation:** Cognitive capture helps transportation groups rapidly and correctly extract data from shipping documents to authorize shipments based on the destination, recipient and contents.

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## Case in point: IBM Datacap for the trade finance industry

### Challenge

A world-leading trade finance bank needed to make trades safer and more efficient for thousands of businesses. The bank had been manually reviewing and processing up to 100 million pages of unstructured trade finance documents such as bank schedules and bills of lading. But to ensure compliance with tightening global financial regulations, the staff was spending too much time checking and rechecking transactions. The bank needed an intelligent capture solution that could apply logic and content-sensitive analysis.

### Solution

The bank's staff configured IBM Datacap to extract key data elements from across multiple unstructured documents and created structured index-value pairs for keywords that might appear anywhere within documents so that they are consumable by other business systems as well. Capitalizing on optical character recognition (OCR) with advanced robotics helped the bank save significant time, effort and accuracy, allowing its knowledge workers to focus on finalizing more trades. The bank now aims to enhance the solution so it can read a wider range of documents in languages such as French, Spanish and Chinese.

### Benefits

- Accelerated transactions and enhanced safety for buyers and suppliers
- Boosted productivity by 18 percent on document handling and reduced data-entry personnel by 50 percent
- Reduced compliance risks while managing 100 million pages of documents
- Increased efficiency and achieved huge savings
- Gained the capability to market the field, driving new business

As one of the five key areas of IBM Automation Platform for Digital Business, Datacap Insight Edition helps organizations digitize business documents while extracting, sorting and understanding important data to help reduce manual entry and errors, increase efficiency and productivity, and gain hidden insights from unstructured documents. With IBM Automation Platform for Digital Business providing the full suite of enterprise automation, organizations can use the platform's flexible, integrated capabilities to automate repetitive human tasks, content management, process workflows, data capture and business decisions.

### For more information

To learn more about IBM Datacap Insight Edition, contact your IBM representative or IBM Business Partner, or explore our interactive demo at: [ibm.biz/BdiMSw](http://ibm.biz/BdiMSw)



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<sup>1</sup> IDC, “Big Data, Bad Data, Good Data: The Link Between Information Governance and Big Data Outcomes,” January 2015.

<sup>2</sup> Forrester, “The Five Key Trends for 2017 That Shape How We Manage Enterprise Content,” May 2017, [www.forrester.com/report/The+Five+Key+Trends+For+2017+That+Shape+How+We+Manage+Enterprise+Content/-/E-RES83441](http://www.forrester.com/report/The+Five+Key+Trends+For+2017+That+Shape+How+We+Manage+Enterprise+Content/-/E-RES83441)



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