

Document Capture, Fax, and Workflow Platform

AccuRoute CX: Document Classification and Extraction

The day-to-day operations of most organizations are dependent on a wide array of document types, both electronic and paper-based. Often, critical data is locked in these business documents. The formats may be virtually identical, similar or completely different. Managing these documents and extracting critical information for discovery, processing, and archiving for historical purposes is an ongoing burden and cost of doing business.

Overview

AccuRoute CX is the software-based engine that drives solutions to automate the manual processing of forms-based documents. With AccuRoute CX forms processing, images are first classified as corresponding document types and then when information needs to be extracted, AccuRoute CX is able to automatically capture and validate the field-level data elements. Resulting document images and document sets are assembled and automatically routed based on the document type and metadata fields captured as part of the document processing workflow and delivered to line of business applications for further processing, content management systems or databases for storage or other destinations as desired:

- **Capture** and extract information from your documents
- **Supports** structured, semi-structured, and unstructured document types
- **Validate** your data against existing data sources
- **Reduce** labor costs for document sorting and data entry
- **Increase** efficiency while reducing errors in your data collection processes

Benefits

- **Streamlined** and reduced processing time for document-driven business processes, especially those that are forms-based and highly repetitive
- **Elimination** of errors and reduction of labor costs associated with automatic data extraction and validation in turn replacing manual data entry
- **Highly scalable** and extensive enterprise-class infrastructure designed to expand and increase capacity as your business demands evolve
- **Single unified software solution** for processing all types of documents. Built upon AccuRoute document capture and fax platform
- **Document classification** and data extraction of forms, in addition to traditional free-form document OCR
- **Cost-effective**, perpetual software license model with no incremental per page fee

Solutions for:

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|---------------------|------------------------|------------------------|----------------------|
| • Employment files | • Legal case documents | • Work orders | • Patient records |
| • Loan applications | • IP communications | • Time reporting | • Resume capture |
| • Purchase orders | • Sales orders | • New account openings | • General line items |
| • Invoices | • Shipping documents | • Medical claims | |

Strategies for Smarter Document Management, Lower Costs, and Reduced Risk

Document Classification

To start the process, AccuRoute CX separates or “bursts” out document sets into individual documents (both single and multi-page) as they are submitted through document classification/identification. The result is a series of documents categorized by form type, regardless of if these documents are structured, semi-structured, or unstructured. A single AccuRoute CX module can handle all of these document types, simultaneously.

Data Extraction

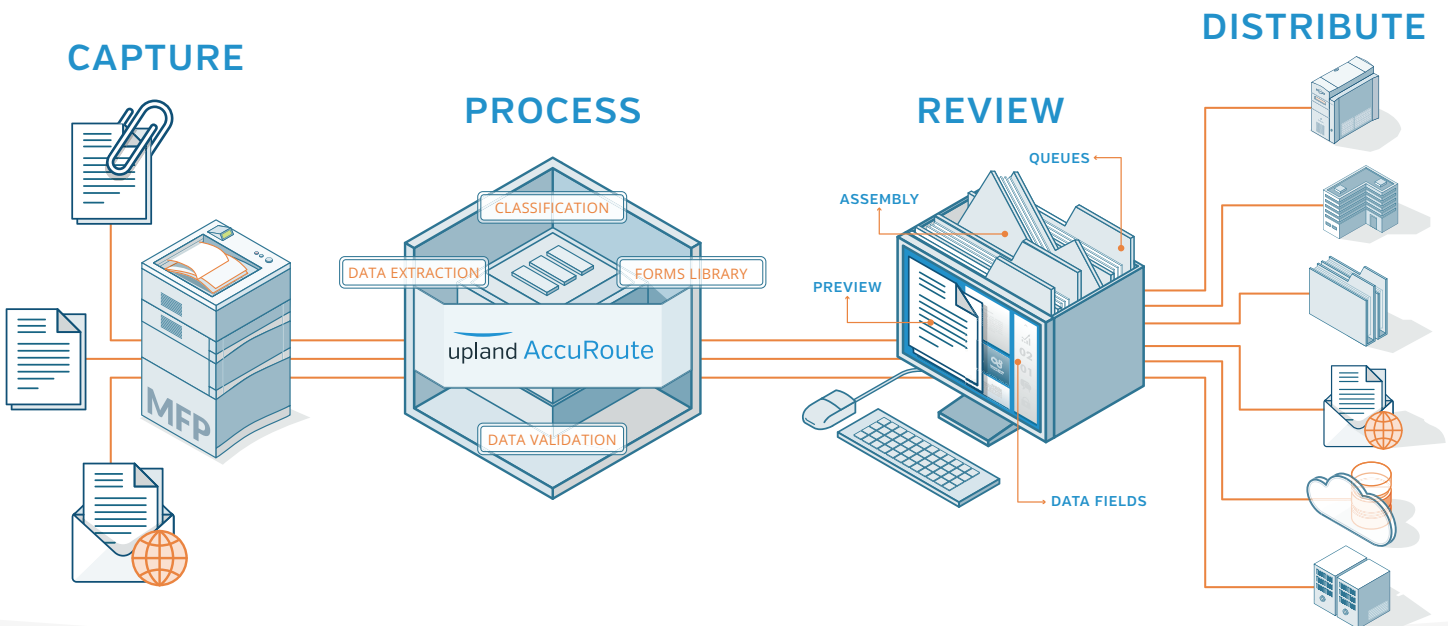
As each of these documents are classified, each data element to be gathered from the forms are identified and extracted. Based on the Forms Library definitions, each of the data elements extracted can be analyzed for further processing or manual review and correction, validation, and exception handling. Each field extracted will be assigned a confidence level related to the validity of the data extracted. Workflow rules can be defined to route based on this confidence level.

Document Routing

Once document capture, classification, data extraction and validation, and review are complete, documents or document sets are routed to the resulting destination based on business process requirements. Destinations of the documents and associated metadata are based on all delivery locations supported by Omtool AccuRoute. This includes document archives, document management systems, line-of-business applications, network file folders, and more.

Document Review and Assembly

While documents and associated data sets can be passed directly to a line-of-business application or document management system for storage and straight-through processing, typically most documents pass through a review cycle for image-quality confirmation, data preview or further data extraction prior to routing. In this stage, AccuRoute CX works collaboratively with Omtool Image-In™ Queue for additional document review, or extensions review, which may entail document assembly, further data review and manipulation or simply a final check.



About Upland Software

Upland Software (NASDAQ: UPLD) is a leading provider of cloud-based Enterprise Work Management software. Our family of applications enables users to manage their projects, professional workforce and IT investments; automate document-intensive business processes; and effectively engage with their customers, prospects and community via the web and mobile technologies. With more than 2,500 customers and over 250,000 users around the world, Upland Software solutions help customers run their operations smoothly, adapt to change quickly, and achieve better results every day.