

Product Suite Overview



Enterprise-Class Document Capture and Workflow Platform

AccuRoute by Upland Software is the preeminent server-based document capture, fax and workflow software solution to capture, process, deliver, and archive critical business documents. AccuRoute delivers flexible, distributed document capture out-of-the-box. Thanks to a highly scalable infrastructure and configuration flexibility, AccuRoute allows you to easily implement solutions involving hundreds or millions of documents per month.

Upland's AccuRoute

AccuRoute is recognized as the industry standard and award-winning software platform that delivers the ability to capture, process, and distribute documents that originate in paper and electronic format. Paper documents are captured (scanned) from any networked scanner, scan-enabled digital printer, copier, fax, or multi-function peripheral (MFP) and prepared for processing by the AccuRoute Server.

Centralize and Manage Documents

The AccuRoute Server converts documents to a variety of formats, collects and provides document-related metadata, validates information, compresses the documents, and then delivers the documents to the destinations required. During the conversion process, documents may be OCR'd (with support for over 45 languages) and/or converted to any variety of formats including PDF, text-searchable and/or bookmarked PDF, DOC, JPG, RTF, TIF, TXT, and XLS, among many others.

Many document processes require capturing the information contained on or with the document that is passed along to the destination with the document image. The metadata collection for this document can be implemented with AccuRoute through a number of options including:

- **Profiling** documents using native document management interfaces and screens
- **Extracting** data from the document
- **Printing/scanning** with prompts to capture new information at the MFP panel when scanning
- **Validating** collected data against pre-defined values

Feature Highlights

Capture

paper and electronic documents for efficient document handling with distributed access

Compatible

with any networked scanner, scan-enabled digital printer, copier, fax or multi-function peripheral

Convert

documents into a variety of different formats (PDF, TIF, JPG, DOC, RTF, XLS, TXT, etc.)

Combine

paper and electronic information to mixed-mode documents

Compress

documents up to 80% of file size reducing bandwidth and storage requirements

Create

personal and public document handling rules (embedded directives) that may be saved for re-use and are accessible from any smart MFP

Communicate

information to various destinations and recipients simultaneously

Consistent

user-friendly interface that leverages existing applications and interfaces, eliminating the need to learn proprietary screens

Comply

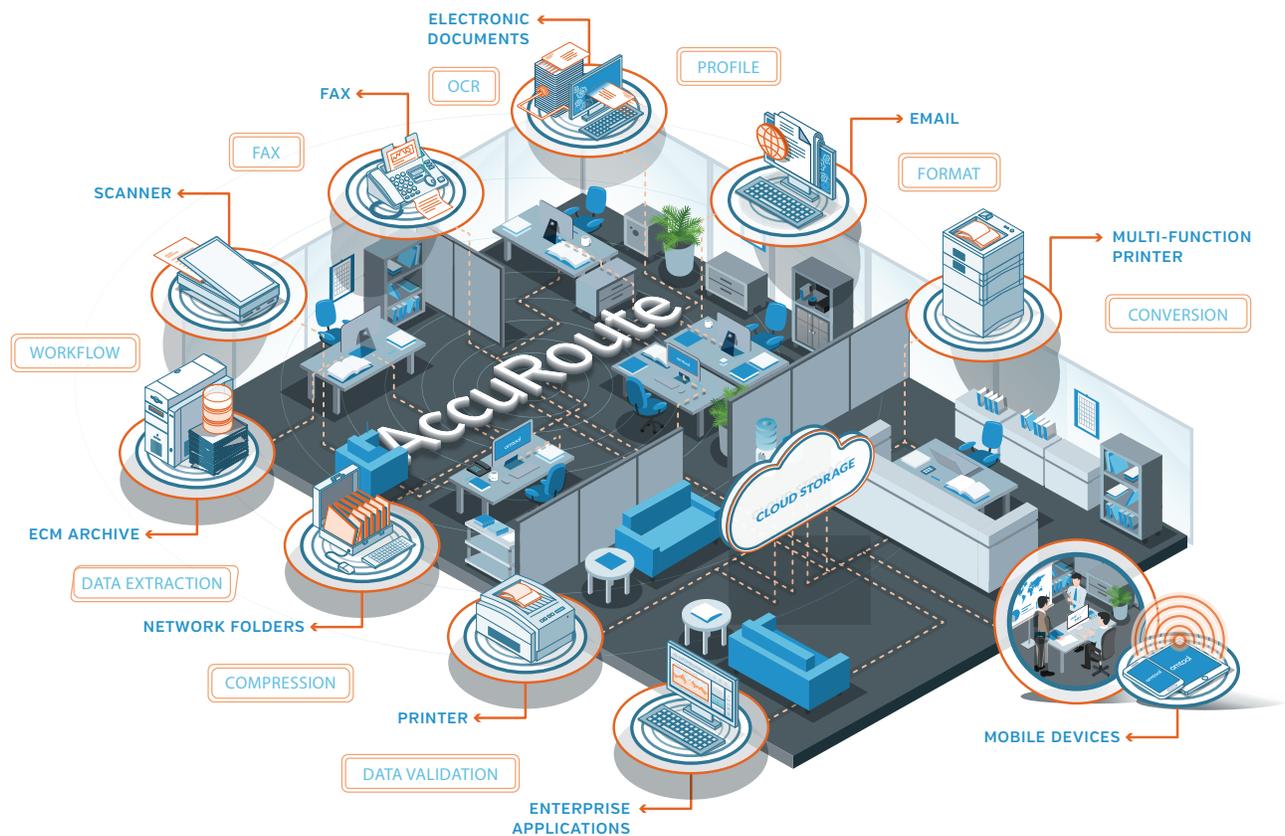
with corporate record retention policies and document archive requirements with comprehensive tracking and document archiving

Centralize and Manage Document-Centric Content

When the processing is complete, AccuRoute will deliver the document image and its related information to the destinations desired, simultaneously. While the image need only be captured once, AccuRoute enables multiple processing tasks and delivery to any number of destinations all based on the single scan. Delivery destinations include:

- **Scan-to-Self:** email, network folder, or web folder
- **Scan-to-Distribute:** email, fax, printer, and distribution list
- **Scan-to-Store:** enterprise content management (ECM) including document management, litigation support, and traditional enterprise content management systems, repository, archive, network folders, or cloud-based storage systems
- **Scan-to-Line-of-Business:** integrate paper processes with your enterprises' software of choice

Companies can now centralize and manage document-centric content with AccuRoute. Specifically designed to integrate with a variety of office hardware and software applications, AccuRoute supports the ability to meet regulatory mandates as well as corporate policies regarding document accountability and record retention.



Tell Your Documents Where to Go, and What to Do When They Get There...

Convert Paper Into Electronic Formats

With the transition of paper into electronic workflows, documents become more accessible. As a result, employees enjoy increased productivity by being able to quickly locate documents, especially in the case when the documents are text-searchable. In addition, electronic documents are inherently less likely to be lost, misplaced, misdirected, or consume valuable real-estate costs related to storing paper.

Centralize and Manage Mixed-Mode Documents

AccuRoute is not limited to the capture of paper-based documents. Electronic documents can also be converted and distributed through AccuRoute, all from the user's desktop. One of the key benefits of AccuRoute is the ability to effortlessly combine paper and electronic documents (or mixed-mode documents) into one package for distribution. With AccuRoute there is no longer a need for separate processes to handle electronic documents versus paper documents.

Create Protected PDFs and Perform Document Compression

Many business processes require that documents are in specific formats such as a PDF or a TIFF file. IT storage limitations and transmission restrictions require documents be compressed whenever possible. With AccuRoute, documents can be automatically converted to PDF and compressed as they are passed through the AccuRoute Server and delivered or saved to the required destination(s).

You even have the option to produce a password-protected PDF file to ensure your information is only viewed by those you intend to view it. Recipients will be able to open the document once they receive the password from the document sender.

Utilize Document Handling Rules Where They are Needed Most

AccuRoute offers multiple, simultaneous routing options available from a user's desktop or from a smart scan device. Distributed document capture places the ability to handle documents in the hands of users when and where they need it. The availability of smart multi-function peripherals (MFPs) that include embedded software, and mobile devices extend the reach of AccuRoute from beyond the desktop to the interfaces of smart MFPs, available from providers such as HP, Ricoh, Samsung and Xerox.

Document Workflows at Your Fingertips

AccuRoute's flexible menu enables a user to select recipients (including document information systems), method of delivery, and preferred file format. AccuRoute creates a routing rule which is stored on the Server and can be printed to a Barcoded Routing Sheet or a workflow button on an MFP. The routing rules are reusable, and eliminates multiple steps in processing documents for electronic delivery.

Routing Sheets were once thought a thing of the past. However, specific business document workflows lend themselves well to Routing Sheets. Imagine an environment where no desktops are available (such as in healthcare) or where certain scanning functions are highly repeatable by the same person. In this case, one Routing Sheet can be reused to greatly increase productivity through replicated tasks.

As an alternative to Routing Sheets, users may opt to print barcodes or routing IDs and attach those to documents for batch scanning.

A Suite of Acclaimed Technologies to Streamline Document Driven Workflows

Extending AccuRoute's Reach to Distributed Smart MFPs

AccuRoute is fully integrated with smart MFPs such as devices from HP, Ricoh, Samsung, and Xerox enabling walk-up users to easily access AccuRoute's advanced document capture, process, and delivery capabilities. Users are able to scan to AccuRoute from these devices by selecting from numerous, customized options. Upland's leverages and integrates with the identification or authentication provided by most MFPs, allowing users to access their personal distribution lists.

- Scan to Personal or Public Distribution Rules
- Scan to MyAccuRoute (default document distribution rules)
- Scan with Routing Sheet or Routing IDs
- Scan to Fax
- Customizable Options

Enable Workers On-the-Go

AccuRoute Mobile is an extension to Upland's AccuRoute document capture platform that transforms your smart phone or tablet into a document capture device. You can quickly submit document images for scanning and processing including format conversions, OCRing and creating pdfs. AccuRoute Mobile will deliver those images to any destination available to you from within the office including fax, email, content management systems, network file folders, printers, and more. You can even capture documents and photos from your mobile device or a cloud-based repository such as Dropbox, Box, Microsoft SharePoint, SharePoint 365, Google Drive, OneDrive or AccuRoute MyFiles.

Leveraging Existing IT Investments

AccuRoute is designed to be an enterprise-class, fully scalable document capture and routing hub. By working with virtually any network-enabled scan device or MFP and a myriad of information systems, AccuRoute becomes the foundation for all your document capture, process, and delivery needs from any document source to any destination or document repository.

Configure to Your Infrastructure and Enable Remote Connectivity

The flexibility of AccuRoute's configuration and the enterprise -class quality of the underlying AccuRoute Server allows AccuRoute to align with your business needs. When configuring the servers and location of users, it will be up to you to define how the access to AccuRoute is enabled. Users at one location share an AccuRoute Server that can also be accessed by remote users through the company WAN or over HTTP.

Enterprise Fax with AccuRoute

Included with every AccuRoute platform, organizations can utilize a full-featured, enterprise fax system with high performance, flexibility, and scalability, as well as full integration with the advanced routing capabilities of AccuRoute. Because enterprise fax is an integrated part of the AccuRoute platform, companies can benefit from significant cost savings through the consolidation of scan and fax machines. Further, to achieve compliance with regulatory requirements, corporate record retention policies, or HIPAA guidelines, AccuRoute can enable the system to send faxes only to authorized recipients, thereby eliminating the possibility of confidential information being sent inadvertently to an incorrect fax number.

AccuRoute is compatible with the latest Voice-over-IP (VoIP) and Fax-over-IP (FoIP) technology. Increasingly, forward-thinking enterprises are seeking to deploy new networks to support voice, video, and data on a single, unified IP network. AccuRoute Fax may also be configured to support outbound routing through cloud-based fax services and Fax-over-IP (FoIP) technology. Increasingly, forward-thinking enterprises are seeking to deploy new networks to support voice, video, and data on a single, unified IP network. AccuRoute Fax may also be configured to support outbound routing through cloud-based fax services.

Enterprise-Class Document Capture, Fax and Workflow

Create a Single, Integrated Workflow

Many business documents processed every day are both electronic and paper-based. Instead of maintaining disconnected systems to manage them, AccuRoute allows users to combine documents, then convert and deliver these documents to specified destinations. A routing rule can also have attached electronic documents. When a hard copy document is scanned using that routing rule, both formats are merged into one electronic file.

Compress Large Files

AccuRoute's Compose Engine compresses images embedded within PDF documents. Black and white images are compressed using JBIG2 and color images are compressed with JPEG and JPEG2000 technology. Standard images from fax and scanners can be compressed up to 80 percent, dramatically reducing file sizes, saving bandwidth and file storage resources.

Scan and Combine Large Documents

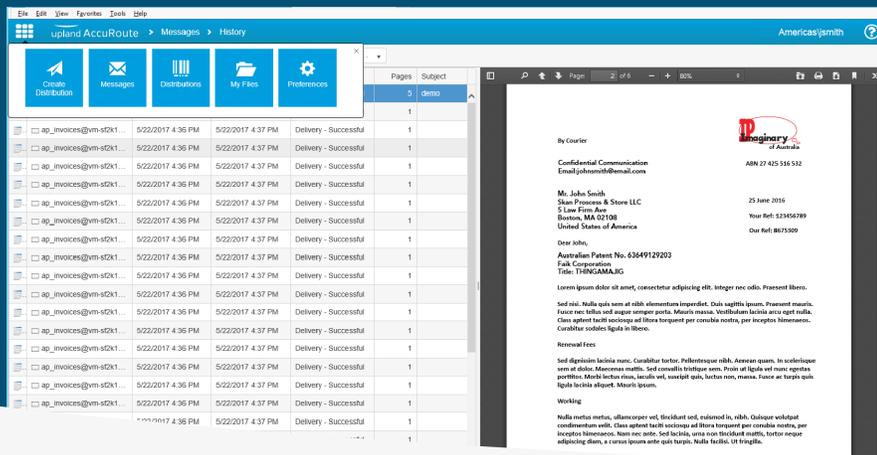
The AccuRoute solution can easily combine multiple documents into one merged document. For extremely large documents that exceed the limit of an automatic document feeder on a scan device, you can scan the document in multiple scans using the same multiple-use routing rule and the pages will be automatically combined into one document.

Batch Scan Multiple Documents

Multiple documents can be stacked and scanned in one scan operation. Simply separate each document using a Routing Sheet, third party barcodes, or even particular metadata and AccuRoute will separate the batch into individual documents and process accordingly. In addition to separating documents, a single document can be split into subsets creating bookmarked PDFs using the same functionality.

AccuRoute Extensible Platform

AccuRoute is not only a means of on-demand capture, but is an all inclusive document capture platform. Included in the suite of AccuRoute products are tools that both help automate manual document related tasks as well as those that make storing those documents much easier. With integrations for the majority of major cloud repositories, vertical specific business applications, as well as a database application of its own, AccuRoute has the ability to propel any company towards progressive business processes, while making it easier at the same time. Scalable to any size, AccuRoute can handle the demands of even the largest of businesses.



AccuRoute Apps

AccuRoute Apps is the newest user interface released in AccuRoute 5.1. This new interface will become the workflow hub for all AccuRoute products moving forward. With functionality complementary to AccuRoute Queue and The AccuRoute Mobile Client, AccuRoute Apps allows for the AccuRoute platform to be more customized than ever. Users will be able to "pin" and "unpin" their favorite workflows to their AR Apps home screen, leverage image preview and release, with more intensive workflow options.

A Variety of Tools to Optimize How Your Business Does Work

AccuRoute Capture Platform

AccuRoute's enterprise-class document- process automation platform lets you cost-effectively capture, process, deliver, and archive critical business documents. We offer tangible, out-of-the-box solutions for the four most popular document capture tasks: scan to self, scan to distribute, scan to store, and scan to business application. AccuRoute solutions seamlessly integrate paper documents with critical business processes so that organizations enjoy faster, more efficient, and compliant document processes, while reducing associated costs, complexity, and risk.

AccuRoute Content Monitor (ARCM)

Data security is always of the utmost importance, and most businesses employ specific security solutions to protect their information. Data Loss Detection and Prevention is a broad industry term for solutions that find sensitive data, then put gates in place to ensure its safety inside the system. AccuRoute has been enhanced to include features and component that create a well-rounded end-to-end security solution, AccuRoute Content Monitor (ARCM).

AccuRoute Queue

Some document processes, even automated ones, require manual intervention to review or manage deficiencies and exceptions, like missing approvals or signatures. AccuRoute Queue lets you view in-process documents needing intervention, then automatically identifies areas that need additional review or action.

AccuRoute Connect

AccuRoute Connect seamlessly integrates your paper documents with line-of- business (LOB) applications so that you can scan, upload, and view paper and electronic documents directly from within your business applications without reprogramming, changing those business applications, or entering redundant data.

AccuRoute CX

AccuRoute CX is the software-based engine that automates 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.

AccuRoute Fax

AccuRoute Fax builds on our innovative technology to make faxing and archiving documents easier, faster, and more cost-effective. Using AccuRoute Fax, you can fax directly from the MFP device with all of the manageability, usability, and cost effectiveness of a centralized digital fax infrastructure.

Solution Benefits

Increase productivity by making documents that were previously difficult to share accessible for collaboration and immediate action. Create electronic copies to reduce the potential of lost documents through mis-filing. Save time thanks to the ability to use existing end user application screens, and eliminating the need to learn new, proprietary systems. Deliver documents to many destinations, in various formats, simultaneously - reducing time spent scanning.

Reduce Costs by creating electronic document files to lower paper consumption. Decrease real estate and storage related to housing paper documents. Eliminate courier and overnight mail service fees. Remove analog fax lines and legacy hardware traditionally required to deliver documents. Leverage investments in existing hardware infrastructure.

Reduce liabilities and support corporate initiatives by adhering to a vast range of corporate record retention requirements, avoiding the risk associated with government regulations and industry mandates. Support green initiatives by eliminating the need for paper copies. Support disaster recovery thanks to preserved electronic files. Comply with regulations such as HIPPA, SEC 17(a), Sarbanes-Oxley and MiFed, etc.

upland AccuRoute

Solution Benefits

Increase customer satisfaction and save time

when you automate processes and go digital with increased accessibility, allowing you to better manage customer interactions and improve overall service response times.

Empower your staff

with one extensible, easy-to-use platform that takes documents and puts them into a single, highly-accessible archive.

Lower your total costs

by consolidating fax infrastructure by relying on Fax over IP technology that enables least cost routing.

Reduce risk

by using a highly-scalable, reliable infrastructure that seamlessly supports a wide range of geographically dispersed financial institutions.

Streamline mission-critical document workflows

for legal teams such as, e filing, scanning to document management systems (DMS), and managing sensitive intellectual property- while maintaining high levels of document integrity and security.

Protect sensitive data

thanks to the ability to set custom business rules, such as holding documents until authorized users can access them.

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.