upland AccuRoute

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Document Capture, Fax, and Workflow Platform

AccuRoute Content Monitor: Data Loss Protection Module

In today's business climate, data security and compliance are more critical than ever. Upland's enterprise-class secure document capture and fax solution, AccuRoute, includes robust and intuitive security features designed to safeguard customer data and facilitate data loss detection and prevention.

Overview

AccuRoute Content Monitor allows organizations to easily monitor documents traveling through their enterprise for sensitive or confidential information. By using specific rule sets, AccuRoute Content Monitor can execute workflows based on the information it finds to protect sensitive information from leaving the organization – or at a minimum, the ability to trace that information. This robust solution gives users the ability to:

- **Search and detect** key terms or sequences in scanned, faxed, or printed (if they pass through AccuRoute) documents that may indicate the presence of confidential information or sensitive data
- **Configure** specific workflow rules for each flagged term
- **Review** flagged documents and related rule sets
- **Create** gated security blocks for sensitive data

Benefits

- **Protect** sensitive organization, customer, and vendor data
- **Facilitate** data loss detection and prevention
- **Prevent** both intentional and unintentional data leaks
- **Reduce** time spent hunting for data or correcting errors
- **Perform** secure scans to detect data loss

> *"The almost daily reveal of significant security breaches around the globe coupled with the introduction of new compliance and regulatory requirements, such as GDPR, are driving more stringent security requirements of technologies that handle sensitive information."*
>
> — **Sean Nathaniel, CTO, Upland Software**

Content Monitor Profiles

To protect data from theft and accidental disclosure, you first need the ability to differentiate day-to-day communications from those that contain sensitive data (for example, a marketing datasheet versus a confidential financial document). AccuRoute Content Monitor transforms the content of documents to text-searchable information, where it then is able to detect key terms or numeric patterns that may indicate the presence of confidential or sensitive data. AccuRoute Content Monitor:

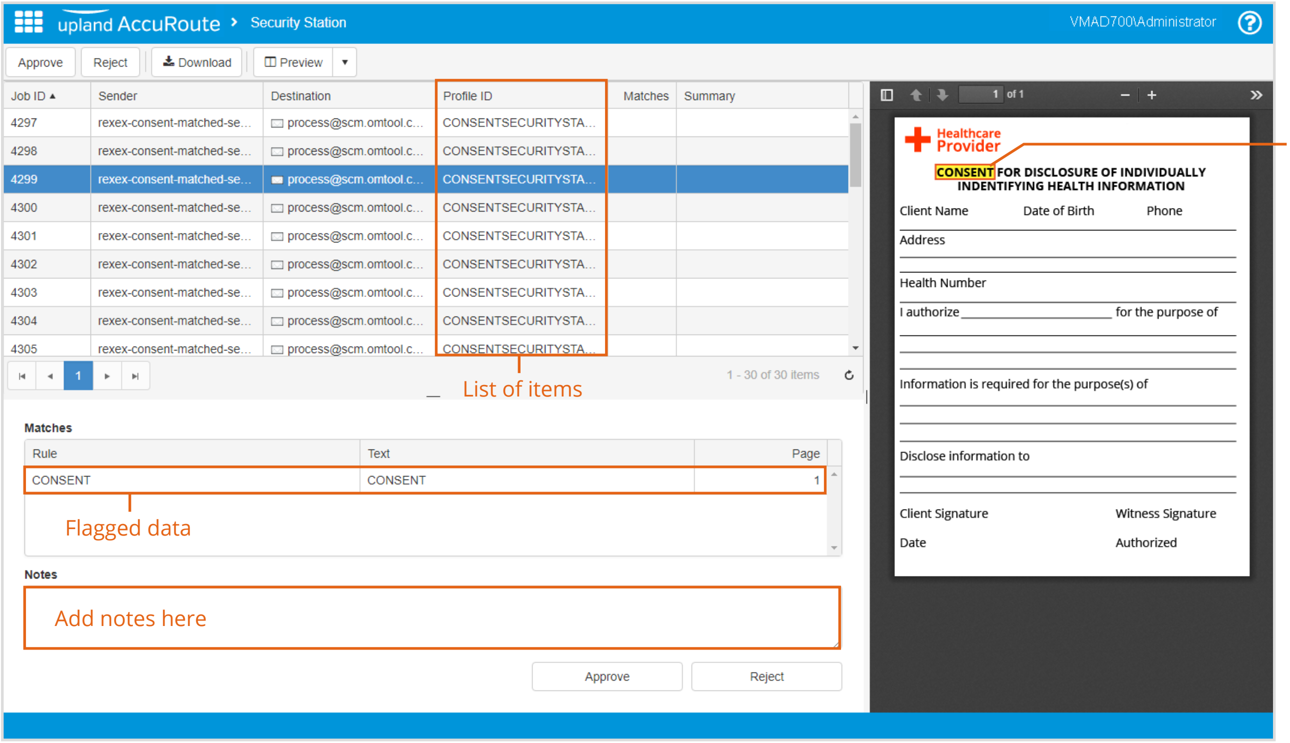
- **Can detect distinct words and phases** (such as "secure", "private", or "confidential"), and specific character patterns, such as credit card numbers or social security numbers.
- **Supports "fuzzy logic" functionality;** meaning it can detect data whether it's uppercase, lowercase, or substitutes numbers or symbols for a character (for example, "s3cure" rather than "secure").
- **Is built around the Optical Character Recognition (OCR) engine** already embedded in the AccuRoute platform, which allows for enhanced scalability depended on the organization's needs and requirements.
- **Can detect any supported languages** which have been added to the AccuRoute server by the organization (using OCR).

AccuRoute Security Station

The system administrator oversees much of the functionality of AccuRoute Content Monitor; however, delegated content auditors or potentially end-users are also able to intuitively interact with the module via the AccuRoute Security Station (found in AccuRoute WebApps).

This simple dashboard platform allows users to:

- **Easily locate** sensitive data that has been flagged
- **Quickly approve** or rejectflagged data
- **Communicate** specifics by adding a note



Job ID ▲	Sender	Destination	Profile ID	Matches	Summary
4297	rexex-consent-matched-se...	process@scm.omtool.c...	CONSENTSECURITYSTA...		
4298	rexex-consent-matched-se...	process@scm.omtool.c...	CONSENTSECURITYSTA...		
4299	rexex-consent-matched-se...	process@scm.omtool.c...	CONSENTSECURITYSTA...		
4300	rexex-consent-matched-se...	process@scm.omtool.c...	CONSENTSECURITYSTA...		
4301	rexex-consent-matched-se...	process@scm.omtool.c...	CONSENTSECURITYSTA...		
4302	rexex-consent-matched-se...	process@scm.omtool.c...	CONSENTSECURITYSTA...		
4303	rexex-consent-matched-se...	process@scm.omtool.c...	CONSENTSECURITYSTA...		
4304	rexex-consent-matched-se...	process@scm.omtool.c...	CONSENTSECURITYSTA...		
4305	rexex-consent-matched-se...	process@scm.omtool.c...	CONSENTSECURITYSTA...		

1 - 30 of 30 items

List of items

Matches

Rule	Text	Page
CONSENT	CONSENT	1

Flagged data

Notes

Add notes here

Healthcare Provider

CONSENT FOR DISCLOSURE OF INDIVIDUALLY INDENTIFYING HEALTH INFORMATION

Client Name Date of Birth Phone

Address

Health Number

I authorize ______________________ for the purpose of

Information is required for the purpose(s) of

Disclose information to

Client Signature Witness Signature

Date Authorized

Flagged data highlighted in document preview

AccuRoute Preview and Self-Policing

Exposure to sensitive data varies depending on an employee's roles and responsibilities. Though some staff encounter sensitive data on a regular basis, not every employee needs strict standard processes set for them as they may not deal with sensitive data often. Introducing, AccuRoute Preview! When paired with AccuRoute Content Monitor, AccuRoute Preview allows the system administrator to provide access to sensitive data to users on an as-needed basis. AccuRoute Preview gives users the ability to:

- **Quickly confirm** the quality of the image
- **Simply view** the scan – no metadata entry or editing needed
- **Note** any flagged data highlighted in preview
- **Immediately approve** or reject data
- **Work in conjunction** with AccuRoute Content Monitor to create a self-policing workflow for Data Loss Detection

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.