Frequently Asked Questions (FAQ)

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What is Unstackr?

Unstackr is a unique, interactive data capture and processing solution. Unstackr enables rapid data capture application creation through simple clicks and drag-and-drop operations.

Is Unstackr a service, on-premises or in the cloud?

Unstackr can be licensed as a SaaS solution, PaaS solution, or fully installed on-prem. Because Unstackr is cloud-native, it can be hosted with the cloud provider of your choice (AWS, Google Cloud, Azure).

Can you convert paper or PDF forms to an Unstackr application?

Unstackr can convert a range of traditional "forms" like smart PDFs, Acroforms and XFA forms, MS Office documents, surveys, and scanned paper forms (in common image formats).

Can Unstackr capture data in forms that have already been filled out?

Yes! Unstackr uses sophisticated image processing AI to differentiate between the form and the data. Data collected in this way, is submitted through the same capture as forms filled out live.

Does Unstackr allow self-service or does Shore prepare and convert forms / documents?

Clients can convert and create forms on their own or Unstackr can provide services to do the same.

How many documents can be converted and in what time frame?

Unstackr is built to ingest and convert thousands and thousands of forms. Depending on form complexity, newly converted forms can be made available in a matter of minutes to hours.

Does the captured information get stored in a central database, online (cloud) or offline?

By design, Unstackr collects data and moves the data to data repositories of your choosing, including local databases, cloud databases, and Sharepoint. In integration scenarios, data can also be delivered to external services and systems.

Does Unstackr integrate with SharePoint?

Unstackr has a native integration with SharePoint. Our integration has access to the full breadth of the SharePoint platform, including, but not limited to two-way data exchange with Lists, packaging completed forms as PDF in a document library, initiating a PowerAutomate flow (as a consequence of document/item contribution), and embedding an Unstackr data capture application in a SharePoint interface.

How are mobile devices supported?

Unstackr has native mobile apps that can present data capture screens or we can present mobile friendly web applications.

Are SMS notifications part of Unstackr's native workflow?

SMS capability is built into Unstackr. Clients wishing to use SMS notifications as a part of workflow simply need to subscribe to an SMS provider of their choice and we can integrate with that service.

Can you customize notification e-mail messages in workflow?

Customized email messaging is natively configured through the business rules engine within Unstackr. Email notification actions, within the workflow, enable full recipient configuration, subject line configuration, and a WYSIWYG editor to configure the message body. In all cases, there is flexibility to add either static values or variables based on the workflow and data capture application.

Where does data reside?

All data processed by Unstackr lives in your on-prem database, a cloud database, or a data lake in your cloud tenant. In addition, Unstackr applications can be integrated with external systems, where data is simply transmitted to the integrated system. Of course, some combination of "all of the above" is also available.

How can you integrate other applications with Unstackr?

Unstackr has pre-built connectors to various systems. These connectors enable rapid integration with a variety of applications. Most commonly, however, Unstackr connects to other systems through a web services integration.

Can you integrate Unstackr Data Capture Applications with online payment systems?

Unstackr natively supports integration with Stripe (www.stripe.com). However, our integration capabilities enable connecting to any payment solution that exposes a public API. Payment information capture and executing payment transactions are configurable within a data capture workflow through our business rules editor.

How do you map Unstackr-collected data to other data sources or applications?

Unstackr has a native data mapping module that allows customers to connect Unstackr application fields to existing data repositories or applications. The data mapping module also allows for data transformation between an Unstackr application and the destination system.

Can you report on data capture activity within Unstackr?

Unstackr natively exposes telemetry—data regarding form submissions, users, frequency—in a dashboard format. Clients may review this information at any time, simply by logging onto the platform and viewing the default dashboard. Data related to specific data capture applications is available for each application through the individual audit logs—including individual submissions and overall application usage. Submission data can also be downloaded from Unstackr through the submissions feature within the administrative interface.

What cloud providers do you support?

Unstackr was written to be cloud native, while retaining on-premise compatibility. As a result, we can deploy to nearly any cloud or on-premise environment.

Do Unstackr applications comply with accessibility standards?

Yes, Unstackr presents HTML that is fully WCAG Level 2 AA compliant. We also ensure converted forms comply with specific jurisdictional standards like AODA for Ontario, Canada and ADA Section 508 in the US.

Does Unstackr allow you to style applications?

Yes. Unstackr supports styling through custom CSS. For more information, contact the Unstackr representative.

How does Unstackr handle data and information security?

Unstackr provides robust multi-layer application security including, but not limited to:

- encryption for data in transfer and at rest
- authentication services including integration capabilities with leading SSO/AIM implementations
- privileged user access management
- role-based access management (which can be configured to include an auditor role)
- CAPTCHA bot detection tests to validate users as human
- environment and application logging and auditing capabilities

Does the service have provisions to protect data quality, access, or hacking?

Unstackr allows you to protect data quality by integrating, tracking, and rationalizing data centrally from the get-go (i.e., with the help of EMXI). Unstackr provides Role-Based Access (RBAC) and permissioning to users accessing the instance. In addition to internal user management built into Unstackr, Unstackr also integrates with an OAuth2 Authentication Server. Integration with Active Directory (AD) users/groups is also supported through business rules that could execute the use of AD role-based permissions. Unstackr's robust monitoring and auditing functionality helps guard against hacking attempts.

Does Unstackr have features such as machine learning or artificial intelligence?

Yes. Unstackr uses artificial intelligence / machine learning in a few ways:

- When ingesting previously completed paper forms, our Document Parser leverages Machine Learning to perform Natural Language Processing (NLP). This NLP facilitates content, form, and character recognition. This allows previously completed paper forms to have their data captured as if it were submitted electronically.
- When ingesting new forms, machine learning models are used to identify individual fields and field business rules to aid in form app creation.

How does Unstackr ensure data quality, especially for paper or PDF data processing?

Unstackr's AI-driven capture model and intelligent character recognition is trained to recognize variations

of letters, words, and other characters with a high degree of accuracy. Besides the standard de-skewing, auto-rotation, missing page detection, filter application or noise elimination functionality, Unstackr's smart OCR provides additional efficiencies and flexibility.

Importantly, no solution is perfect. Unstackr provides several facilities to catch poor data conversion and provide continual "training" for our machine learning models allow improved accuracy over time.

What happens when Unstackr isn't able to reliably convert data or when language processing confidence is low?

Unstackr's smart OCR recognizes variations of letters, words, and other characters with a high degree of accuracy. Unstackr's NLP module recognizes paragraphs and repeatable content blocks. This further improves precision in document processing. Unstackr also offers intelligent capture and editing of complex business logic of the original data inputs. If Unstackr detects illegible content or assigns a confidence score below the threshold set by the customer, the questionable data is moved to a queue for human review. Human intervention corrects misprocessed data and updates Unstackr's machine learning model, improving future conversion.

What does EMXI stand for?

EMXI stands for Enterprise Master Person/Business Index and is developed from the term EMPI or Enterprise Master Person or Patient Index. Unstackr's EMXI allows enterprises to integrate, track, and rationalize data centrally and determine the Golden Record for a person or business.

How does Unstackr capture the individual business rules and how are those rules mapped back to their data sources?

Business rules are created either as part of ingestion or manually in Unstackr's administrative console. Automatically captured business rules are created in two ways. If the source form is an XFA, fillable PDF, or Acroform, field-level business rules are created to match rules already defined in the source file. If the source form is a scanned image, business rules are created using machine learning models that recognize specific field patterns, such as date and/or signature fields. Any rule can be added, modified, or deleted using Unstackr's administrative console, regardless of how it was originally created.

All rules are stored and associated with individual fields, along with the deployable form app.

What makes your platform unique?

Unstackr has several meaningful differentiators:

- Speed: Time to ingest, convert, and make forms available only takes minutes to hours
- Integration: Flexibility to integrate, rationalize data, and send it to your existing data sources or application
- OCR: Unstackr provides an omni-channel input where completed, scanned form data is ingested and stored
- Conversion: Unstackr is the only solution that can convert XFA, fillable PDFs, Acroforms, and scanned forms seamlessly and at a scale

- Business rule power: Unstackr is able to fully convert all smart form business rules and use machine learning power to create new rules based on scanned forms. In addition, our IDE allows you to adjust, add, or delete rules within any form. Importantly, these changes can be applied to all forms within Unstackr automatically.

Can you provide us with any references?

Unstackr has a wide installation base with satisfied customers across many industries. Please contact an Unstackr representative to learn about specific implementations and clients (where client permission has been granted).

OK, we're interested in moving forward with Unstackr. How do we get started?

Shore works collaboratively with each customer to deploy Unstackr to your environment and begin building Unstackr applications. We accelerate the necessary work to ingest and deploy the first few forms, as well as help your staff understand how to use the platform.

Who would be responsible for setting the service up and running?

In all cases, Unstackr sets up the initial implementation. We also accelerate the necessary work to ingest and deploy the first few forms, if required. Regular maintenance and feature enhancement releases are deployed regularly to licensees at no charge. For those customers that have not purchased a maintenance contract, additional administration, beyond maintenance and feature releases deployment, are the customer's responsibility.

What does onboarding and training look like for Unstackr?

Shore provides a variety of training programs to meet individual client needs. Shore Consulting provides initial on-boarding training. This enables our clients to familiarize themselves with the solution. Additional training is often designed around client outcomes and needs.

How long would it take to go live?

Depending on form complexity, forms can be ingested, converted, and made available in a matter of minutes to hours.

How is Unstackr licensed?

Unstackr is licensed two ways:

1) SaaS model with yearly subscription fees based on the number of active / published data capture applications

2) On-premise model started with a one-time setup fee and a perpetual license based on form hosting volume, starting at 250 forms

Unstackr offers professional services in addition to our software. Services include form development, workflow optimization, business process development, and solution customizations (e.g., new integrations). Please contact your Unstackr representative for more information or a pricing estimate.

Are there volume discounts?

Yes. Volume discounts are available based on the number of applications or transactions. Please speak to your Unstackr representative for more details.