

omtool



*Solutions for the*  
**Legal Industry**

# Automating Document Workflows to Streamline Legal Processes

From depositions and contracts to court filings, invoices, and records requirements, in the legal industry today, document processing is all about high volumes, high speeds - and high stakes.

## A Successful Calculation

In an environment that's both extremely competitive and technology progressive, the legal market remains one of the most document-intensive industries today. While forward-thinking firms are devoting increasing IT resources toward the transition to electronic records, massive numbers of paper documents still exist. Document processing is all about high volumes, high speeds—and high stakes. Is your organization prepared to meet these requirements?

⊕ **Less Paper Firm:** Storage of documents is extremely expensive, time consuming and inefficient. Paper is extremely volatile and susceptible to loss due to natural causes such as fire or water damage - or simply to misplacement. With firms liable for protecting client information, safeguarding content is an imperative.

⊕ **Service:** Customer churn is a critical concern for law firms. If paper documents are hindering your ability to deliver responsive service to your customers, then it's time to consider ways to deliver faster, more competitive service.

⊕ **Productivity:** Having a productive staff is a necessity for any paper-intensive organization. Is your company doing everything it can to streamline paper processes, avoid needless delays, and utilize valuable resources?

⊕ **Business Continuity:** Critical information comes in both paper and electronic documents—that requires a smart reliable solution to protect that information. Are you protecting your sensitive documents from unauthorized access and disastrous business disruptions? It's no longer acceptable to rely on.

## Don't bury your customers in paperwork.

It's no longer acceptable to rely on yesterday's time-consuming, inefficient processes to manage the growing heap of documents you face today. *Fortunately, with Omttool AccuRoute, document capture and distribution is now an everyday front-office process that carefully utilizes valuable resources and makes critical documents readily accessible.*

## PAPER CHALLENGES

- ▶ **Space:** Onsite or offsite, paper is expensive to store
- ▶ **Couriers:** Whether it's local transport or overnight mailing, trying to get documents and records to clients, co-counsel, opposing counsel and courts can be very costly.
- ▶ **Mailroom:** More efficient processing and delivery means documents are in the hands of the attorney who is waiting for them.
- ▶ **Sharing:** It's hard to collaborate without wasteful, expensive copying.
- ▶ **Accessibility:** It's either huge briefcases or constant requests dispersed to support staff who need immediate access to matter-centric information.
- ▶ **Privacy & Risk:** Making documents as safe as they need to be while not decreasing productivity.
- ▶ **Multiple Document Types:** Vital case information comes in numerous sources and formats that can be a nuisance to handle
- ▶ **Cost:** Whether it's materials, real-estate, or time - paper is deceptively expensive.
- ▶ **Eco-Footprint:** Conserve paper and cut out the wastefulness of the paper chase.

# An All-Inclusive Document Processing Platform to Deal with All the Paper

Savvy legal teams rely on **AccuRoute**<sup>®</sup>, Omtool's enterprise-class document process automation platform, to capture, process, deliver, and archive critical business documents. **AccuRoute** delivers extensive legal-specific solutions with flexible configurations and the simplicity to implement basic or comprehensive solutions that involve thousands or millions of documents per month. With **AccuRoute**, law firms can:

⊕ **Capture:** **AccuRoute** supports any networked scanner, scan-enabled digital printer, copier, fax, or multi-function peripheral (MFP) to capture all your paper documents.

⊕ **Process:** Interchangeably convert your paper into a wide range of electronic formats: PDF and text-searchable PDF, PDF/A, Microsoft Word and Excel, JPEG, RTF, TIF, and many more. You can even extract data from barcodes, validate the data, and "profile" your documents before archiving in your document management system.

⊕ **Deliver:** After you scan, **AccuRoute** can quickly, easily, securely, and automatically deliver your document (by fax or e-mail) to yourself, internal colleagues, payers, outside providers, or other authorized stakeholders — all while providing a complete audit trail. You can also store documents in shared network folders or document archives and repositories.

## Improving Document Processes in Legal Services

The **AccuRoute** platform has the ability to manage and improve virtually every aspect of the legal information flow:

- ▶ Documents and records
- ▶ Cases and matters
- ▶ Contracts
- ▶ Discovery
- ▶ Court filings
- ▶ Litigation support
- ▶ Cost recovery
- ▶ Vendor invoice processing
- ▶ Disaster recovery

Law firms are able to access the information they need with **AccuRoute**—anytime, anywhere, and in any format. Using **AccuRoute**, firms can drastically cut document costs, improve productivity, accelerate workflows, and deliver consistently higher-quality results to their clients.

"We're not hunting down paper correspondence or trying to determine if anything's missing from a case file. It's all in one place — and that place is wherever the attorney is."

*Monroe Horn, CTO  
Sunnstein Kann Murphy  
& Timbers LLC*

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

## Documents and Records Management Integration

AccuRoute provides a cost-effective, practical solution for document distribution and records management. You can easily and efficiently control, distribute, and store documents in a variety of document management systems such as iManage WorkSite, Microsoft® SharePoint®, Open Text eDOCS, NetDocuments®, World Software Worldox®, and many others. Improving the sharability of documents, strengthens team collaboration, and lowers document-management costs.

## Records Scanning

Converting to electronic documents through here-forward or beginning of time production scanning will yield a severe reduction of storage costs. Electronic documents also grant greater accessibility to your employees, thus enhancing the customer experience. Adoption of AccuRoute as a solution will allow you to perform batch scanning of documents, scaling for any sized project.

## Discovery

Forget the endless cycle of copying documents, couriering to opposing counsel, sifting through paper copies, and storing crate after crate. With AccuRoute, you can scan, share, search, and store documents electronically — quickly, easily, and securely. That more, thorough discovery cycles are faster and less expensive.

## Litigation Support

AccuRoute lets you import content into specialized systems like LexisNexis Concordance®, CT Summation, and FTI® Ringtail™ Legal, centralizing critical case information. You can effortlessly share content with co-counsel and opposing counsel. Best of all, AccuRoute streamlines operations and protects the confidentiality of these sensitive documents.

## Vendor Invoice Processing

AccuRoute accelerates the flow of invoices and related information through approval cycles and into standard legal financial systems. You can capture vendor invoices (by attorney or accounting department), collect client and matter billing codes, dates, and billing categories. Then you can process the invoice and send it with a scanned image for approval. Your team spends less time on administrative detail and more time helping your organization practice law more efficiently.

## Disaster Recovery

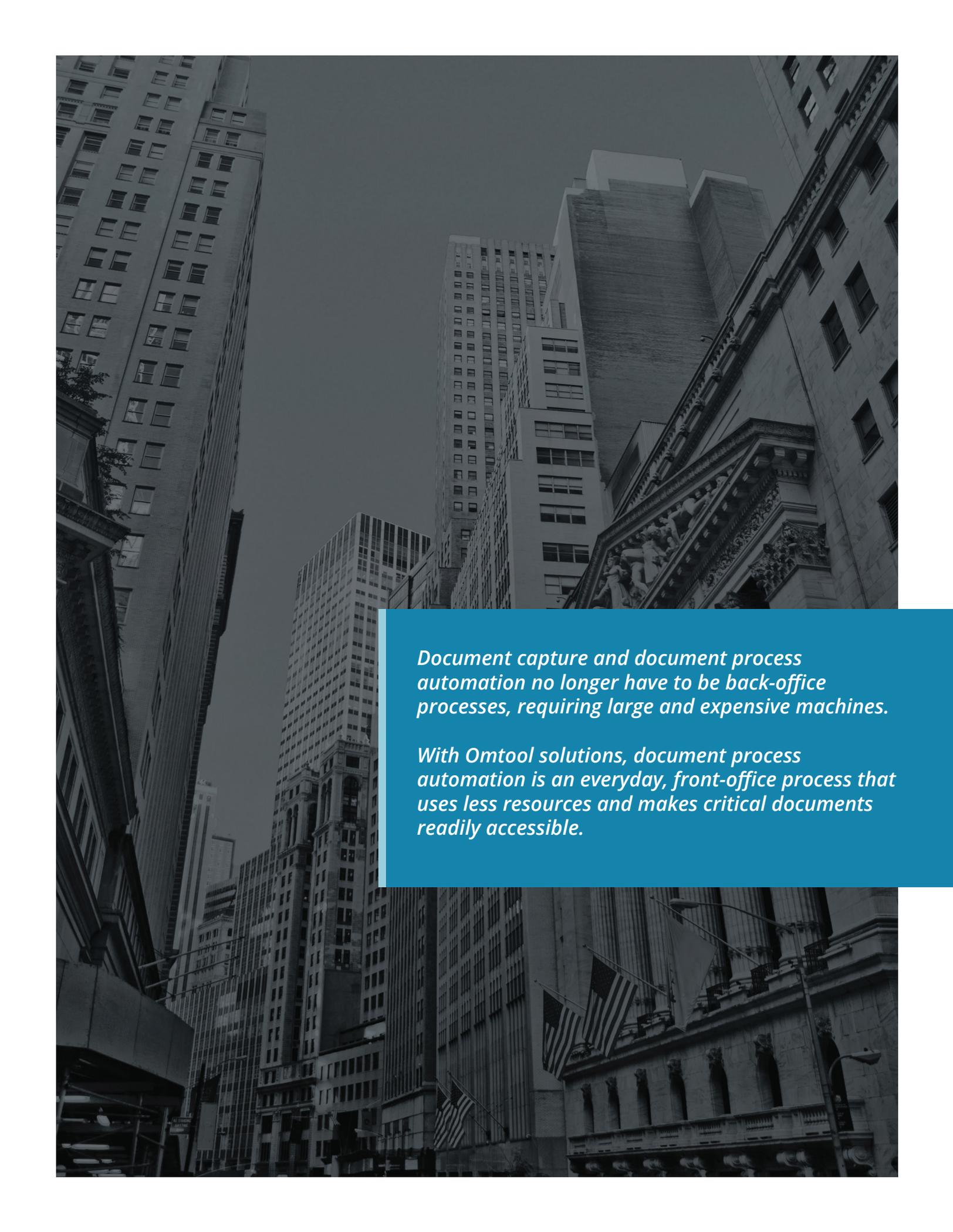
Through its ability to capture, deliver, and manage mixed-mode (both paper and electronic) documents, AccuRoute provides an exceptionally valuable solution for protecting your documents and ensuring they are secure and available in the event of a disaster. AccuRoute centralizes critical legal documents and conveniently stores, shares, and exchanges content while streamlining and accelerating the recovery and continuity of your business after a disruption. Your vital archives of legal documents are safe from disasters that could otherwise cripple your operation.

## Court Filings

More court systems are mandating electronic filings for virtually every aspect of cases in their jurisdictions. For AccuRoute, e-filing can be a standard distribution process — thanks to easy conversion to text-searchable PDFs and other formats, compression, document splitting (based on file size or page count), and delivery to multiple locations in multiple formats. AccuRoute makes it easy to efficiently comply with the new mandates.

## SOLUTION BENEFITS

- ▶ **Increase customer satisfaction** and save time when you automate processes and go digital with increase accessibility allowing you to get back to the customer faster than ever.
- ▶ **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.



*Document capture and document process automation no longer have to be back-office processes, requiring large and expensive machines.*

*With Omtool solutions, document process automation is an everyday, front-office process that uses less resources and makes critical documents readily accessible.*

# AccuRoute Value: Case Study

## Taylor Wessing LLP

### Challenge

For a firm of such size and breadth, cost-control and productivity were critical concerns. The firm's IT department was highly motivated to seek out efficiencies. Requiring more than 20,000 linear feet of filing capacity (which was 84 percent full) in one of London's priciest business districts, paper records were a budget-killing expense. A plan was already in place to relocate the firm's London office to new premises. The thought of moving millions of documents to the new location was particularly unappealing because it would be expensive and require a large footprint in the new space. Taylor Wessing sought a solution to convert this paper to electronic form, thereby eliminating the need to transplant the records room.

### Solution

Taylor Wessing had already implemented a broad portfolio of technology from iManage® to store, access, and share documents. However, it still needed a way to integrate paper into the iManage document and records management systems and ensure the firm had all of its critical documents in electronic form.

The firm selected Omtool AccuRoute® to capture, process, and distribute all its paper and electronic documents using multifunction peripherals (MFPs). With Omtool's reusable Intelligent Routing Sheets, lawyers or secretaries could easily scan their documents with a single button and route them back to their computers, a network folder, or directly into iManage. For large volumes, office personnel could bulk-scan multiple jobs.

Thanks to seamless integration between iManage and Accuroute, Taylor Wessing was also able to create a drag-and-drop method for filing documents in iManage. The user simply needed to drag a document into a matter-specific folder on his/her computer desktop and profile it into iManage. Users could also send emails and have them automatically filed in iManage.

*With more than 900 lawyers working in 22 offices across Europe, the Middle East and Asia, Taylor Wessing LLP is a full-service law firm offering integrated legal services across the full range of practice areas, with core strengths in corporate, finance, real estate, IP and private wealth.*

### The Result

AccuRoute delivered tremendous cost savings to Taylor Wessing, particularly in connection with its corporate office relocation. A full 100% of Accuroute's cost was recouped in the first year due to the reduced need for onsite storage of paper records. When the firm moved offices, it no longer stored paper documents onsite. Instead, their staff scanned documents and sent the paper files offsite. Since Taylor Wessing no longer needed the same amount of physical storage onsite, the firm saved more than \$1 million in real estate costs. Attorneys and staff now have secure remote access to both active and archived documents, including access from smartphones, when and where they need it most.

In addition to increasing productivity and significantly reducing operating costs, Omtool AccuRoute helped Taylor Wessing:

- Cut physical filing needs more than 50% from approximately 45 linear feet per fee earner down to just 22
- Achieve ISO 14001 compliance for environmental management
- Minimize its environmental impact while producing a solution that conforms to business continuity requirements of document safekeeping
- Make document information easily available throughout the organization

# A Suite of Acclaimed Technologies to Streamline Financial Document Workflows

## AccuRoute

Omtool's enterprise-class document- process automation platform lets you cost-effectively capture, process, deliver, and archive critical business documents. AccuRoute goes above and beyond with 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 Fax

AccuRoute Fax builds on Omtool AccuRoute's 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.

## Image-In™ Connect

Image-In 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.

## Image-In Queue

Some document processes, even automated ones, require manual intervention to review or manage deficiencies and exceptions—such as missing approvals or signatures. Image-In Queue lets you view in-process documents requiring manual intervention and automatically identifies areas that need additional review and expert intervention for numerous types of paper document processes.

## ObjectArchive™

ObjectArchive is a high-performance file system that stores the documents, images, and metadata captured by AccuRoute in virtually any type or format. It provides immediate access to documents, forms, and records where and when they are required, while ensuring enhanced levels

## ObjectArchive™

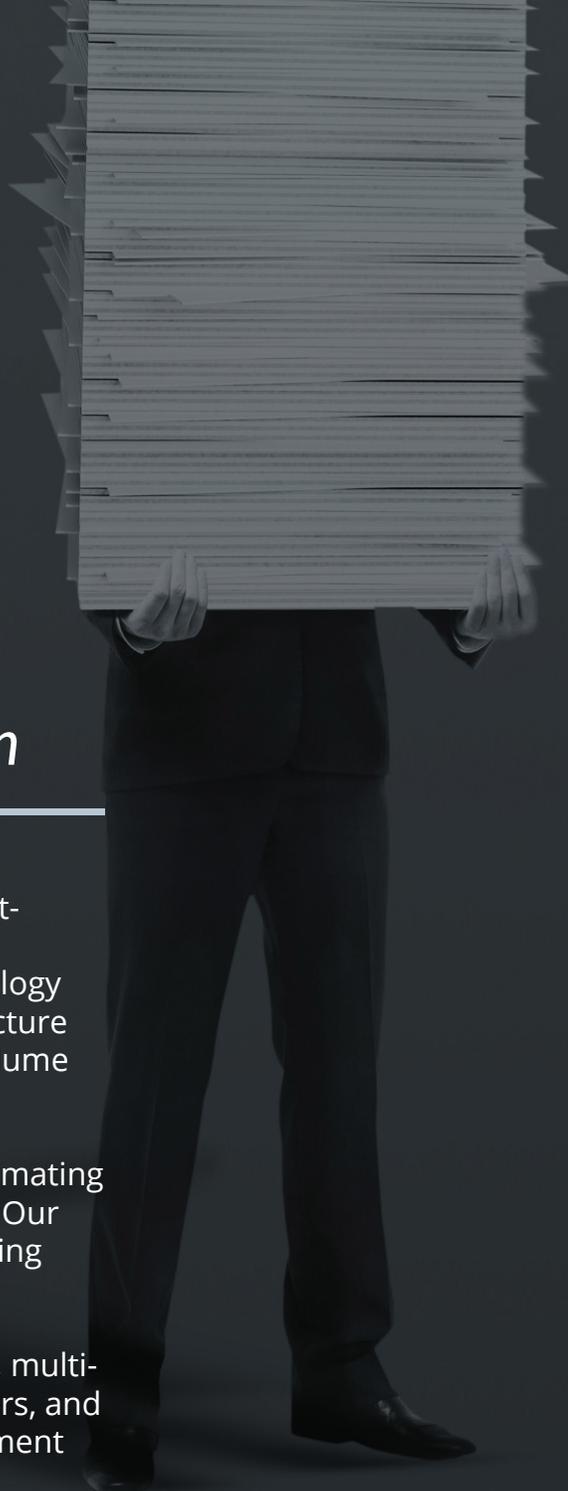
ObjectArchive is a high-performance file system that stores the documents, images, and metadata captured by AccuRoute in virtually any type or format. It provides immediate access to documents, forms, and records where and when they are required, while ensuring enhanced levels

## AccuRoute CX

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.

## SOLUTION BENEFITS

- ▶ **Increase customer satisfaction** and save time when you automate processes and go digital with increase accessibility allowing you to get back to the customer faster than ever.
- ▶ **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
- ▶ **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.
- ▶ **Protect sensitive data** thanks to the ability to set custom business rules, such as holding documents until authorized users can access them.



## *The Leader in Financial Document Process Automation*

---

For more than 25 years, Omtool has helped some of the world's largest corporations and leading law firms cost-effectively manage their document-intensive process-automation challenges. Continually refining its technology innovations, Omtool offers a platform with an architecture that incorporates our extensive experience in high-volume document processing to address "all the paper."

Today, AccuRoute provides the infrastructure for automating document processes in hundreds of firms worldwide. Our solutions are now the standard for organizations looking for enterprise-wide automation of their paper-centric processes. With our extensive experience automating processes involving millions of documents per month, multi-function device vendors, software and service providers, and law firms trust Omtool to handle all their paper-document process automation needs.

## Find Out How Omtool Can Help Your Team

Omtool, Ltd. – US Headquarters

Office Location: 6 Riverside Drive, Andover, MA 01810

Telephone: 800-886-7845

Fax: 978-659-1300

General Inbox: [omtoolteam@omtool.com](mailto:omtoolteam@omtool.com)

On The Web: [www.omtool.com](http://www.omtool.com)

**omtool**