

omtool™



Solution Brief for
Records Scanning

Records Scanning

Challenge

Storing mountains of physical documents is extremely expensive and it is still difficult, if not impossible to locate records when needed without additional retrieval costs. 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.

Solution

Automating correspondence and document ingestion into the firm's electronic document process with immediate document classification and data extraction. With electronic delivery to fee earners and applications for document review, assembly, and data-driven routing to reduce processing time, eliminate sorting and data entry errors, and realize quicker time to billing.

In law firms today, on-demand capture has become a pervasive and mission-critical application. As firms are consolidating storage space, moving offices, or even closing active cases and storing the boxes of paper files, they are finding themselves with the need to do high-volume scanning of their stored records or scanning the closing cases on their way to storage. Records scanning has become a firm imperative and many legal IT teams are using on-demand capture systems to tackle this challenge.

Making the Move to Automate Records Scanning Processes

Whether a firm has undertaken the initiative to go paperless or reduce paper, or needs to reduce storage space - they are making the move to implement records scanning processes. Many firms find themselves faced with the daunting task of managing real estate and storage costs. Whether a firm has a large offsite facility housing their archives of files and records or outsources this responsibility to a 3rd party data warehouse, the growing volumes of paper and records with escalating real-estate costs are driving the demand to capture paper into electronic images prior to the final storage and/or ultimately the destruction of the physical records.

The challenges related to records are easily quantified:

- ⊕ Expensive record retrieval - physical documents are difficult and expensive to obtain when needed
- ⊕ Hardcopy documents increase risk - paper is extremely volatile and susceptible to loss and/or misplacement
- ⊕ Difficult to capture records - electronic files and paper are stored separately making it difficult to find complete records
- ⊕ Costly storage - either firm-owned on premises or 3rd party off-site storage is extremely expensive

Benefits to adopting a records scanning solution:

- ⊕ Meet Obligations to Preserve Client Content- requirements for information retention are met faster and more cost effectively
- ⊕ Mitigate Risk - reduced exposure to potential litigation from improper handling of records
- ⊕ Increase Accessibility of Information - content may be retrieved in a timely manner as documents are discoverable, indexed and protected
- ⊕ Reduce Records Loss - lower the impact of paper destruction or the chance of misplacing hardcopy materials with a secure, electronic copy



Do it Your Way: Leveraging AccuRoute's Flexibility

Planning for the Future

Today, firms are moving to smaller or simply less expensive office space. As they are making the move, the CIOs and records managers are questioning the need to drag along all the paper files. In advance of a move, many firms are converting their documents to electronic images and leaving their real-estate, storage, moving, and filing system costs behind.

By implementing document capture software, firms are realizing significant cost and time savings.

AccuRoute in Action

AccuRoute is Omtool's flagship document capture, fax, and workflow software. While hundreds of firms have adopted AccuRoute to perform their on-demand, day-to-day capture of active legal documents into matter-centric DMS systems or other communications, more and more firms are leveraging their existing infrastructure to address the mounting records scanning challenges.

With Omtool AccuRoute implemented as the scanning engine for one London-based law firm, they were able to achieve a 50% reduction in required storage space and over \$1 Million in savings prior to their office move.

Batch Scanning Records

AccuRoute is highly scalable and can scan millions of pages a month. In order to address the physical files already housed in a law firm's archive, AccuRoute can scan the volumes of paper in a batch function. By using routing sheets, records may be indexed and profiled prior to scanning. Batches of records may then be scanned in a high-volume process, using routing sheets as separator pages, increasing the efficiency and accuracy of back scanning.

Scanning Closing Files Before Storage

As an in-process option, as active files move to closure and closing documents are prepared, the paper files can be imaged and stored alongside the electronic content for a complete document record. The resulting image files are fully text-searchable making them available for enterprise search, e-discovery, and any other future accessibility requests. Further the records information and locators may be indexed to provide easy access and retrieving of files once they are sent to storage.

Image Review and Validation of Data

With Image-In Queue™, Omtool's document workflow application works as a "validation station" for records scanning in process. The office or service staff performing the scanning can preview images and associated indexing information before releasing to electronic storage or sending back for rescan in the event the image quality was not sufficient. Improving or adding quality control into your processes.

Scanning as a Service

As firms look to their staff to undertake scanning initiatives, often times it is easier and more cost-effective to leverage the copy services, mailroom staff or facilities management staff to perform scanning as a service. As the legal staff may easily create "job tickets" or cover sheets that contain key indexing information, the resulting document format and delivery requirements, the service staff merely needs to gather and scan the documents or batches of documents without worrying about the document instructions. In this model, the knowledge worker or document owners may get a receipt of confirmation or even the job ticket back to confirm delivery, all while staying where office staff is most valuable - at their workstations.

The Leader in Document Driven Workflow Automation

For more than 25 years, Omtool has helped some of the world's largest corporations 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, businesses of all sizes trust Omtool to handle all their paper-document process automation needs.

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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

Omtool, Ltd. – UK Headquarters

Office Location: Centurion House, London Road
Staines, Middx TW18 4AX

Telephone: +44 0-203-468-6607
Fax: +44 0-203-514-6765

General Inbox: omtoolteam@omtool.com
On The Web: www.omtool.com