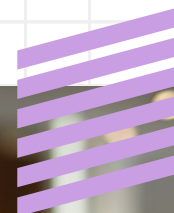


Case Study

**Post & Schell
digitizes records
to increase
attorney access.**



INDUSTRY
Legal

COMPANY

Post & Schell
Lancaster, Pennsylvania
postschell.com

For 50 years, Post & Schell, P.C. has provided legal services and strategic counseling to highly regulated industries and their directors, officers, and stakeholders regionally, nationally, and internationally.

**Post &
Schell**_{PC}
ATTORNEYS AT LAW

Post & Schell used AccuRoute to undertake a paper records consolidation initiative before an office move. Along the way, they also realized the many benefits of providing accessible electronic documents to attorneys in multiple offices, the home office, or on the road. The firm also upgraded to a digital mailroom to ensure attorneys had real-time access to urgent files and documentation.



How can legal firms ensure secure, fast access to case files for remote staff?

This law firm wanted to downsize records storage and provide better access for attorneys and legal staff.

Post & Schell was moving its Lancaster, Pa., office to a smaller space with less storage for paper records. The firm's IT and Records team took this opportunity to investigate how technology could help lawyers access and search for documents, even while on the road. Transforming paper-based processes such as incoming office mail became a greater priority as the firm sought to roll out a firm-wide paperless initiative.

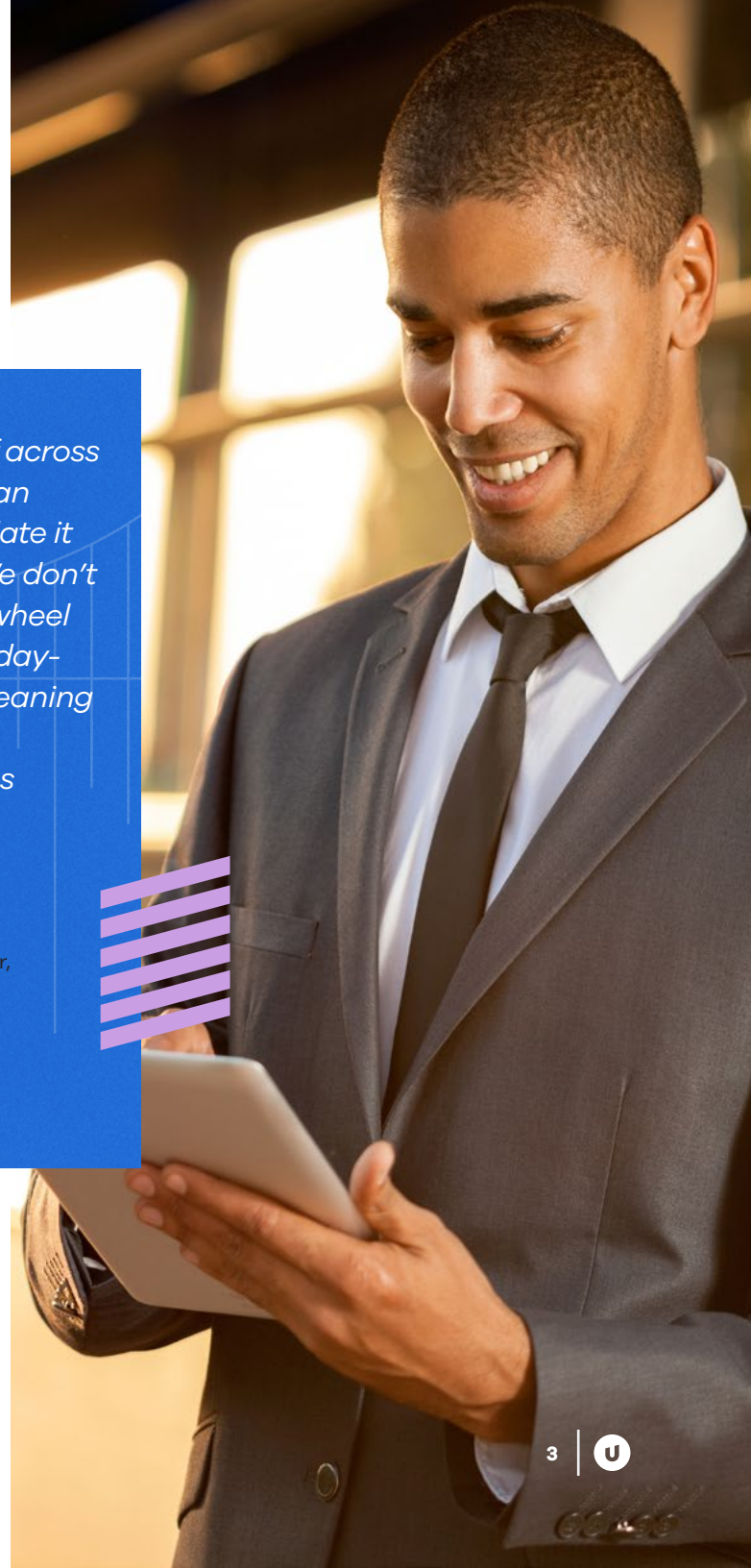
Upland AccuRoute integrated with iManage to conquer the paper chase.

Although going 100% paperless may not be an option, implementing digital records processes eliminated 75% of paper storage and greatly increased efficiency across the firm. By integrating with the firm's iManage document management system (DMS), AccuRoute also allowed for faster, more standardized digital mail processes to provide attorneys with access to critical documentation from anywhere.

"Our lawyers and staff across the entire firm can scan paper in and manipulate it any way they want. We don't have to recreate the wheel anymore. We have a 'day-forward' approach meaning that we are carefully scrutinizing paper files before they are sent to off-site storage."

— Catherine Saldutti

Records Supervisor and Trainer,
Post & Schell



For Post & Schell, reliable access to time-sensitive case files and documentation was a big win.

Integrated software made reliable document access easy.

AccuRoute and the firm's iManage FileSite DMS integrated seamlessly. AccuRoute scans the documents, performs optical character recognition (OCR) to make them text-searchable, and then profiles information to send it to the correct destination in iManage FileSite's central document repository for storage and retrieval.

Having documents in electronic format has brought greater flexibility and efficiency to the firm. Post & Schell's attorneys can access their documents electronically with ease from any device, even while away from the office. Using the AccuRoute/FileSite integrated system,

the Post & Schell Records team scanned most archived paper files well before the Lancaster office move and reduced storage needs by 75%.

Digital mail processes meant more time to dedicate to clients.

The firm used AccuRoute to streamline mail handling throughout the firm. Rather than having lawyers drop by the office to retrieve their mail, all mail is now sorted by attorney from one office. Mail is then opened and scanned using AccuRoute's routing sheets, which contain embedded instructions on where to send the document.

Upon scanning, AccuRoute performs an OCR on the mail to make it text-

searchable. The scanned mail is automatically stored in each lawyer's electronic folder in FileSite, where it can be retrieved at any time. An email notification is sent to each lawyer with hyperlinks to the scanned mail items, and the lawyers simply click on the links to read their mail.

Using the power of an AccuRoute-iManage technology partnership, Post & Schell has increased billable hours and improved access by streamlining records and mail processes. Attorneys have anytime access to urgent case files and mail that needs immediate action from wherever they're working.

Results for Post & Schell

75%
paper storage
reduction

Post & Schell reduced storage space to one modestly sized file room.

Upland AccuRoute helps organizations accelerate business processes by allowing users to easily capture, process, deliver, and fax content from any device using a single, unified platform. AccuRoute automates data capture and extraction using optical character recognition (OCR) to securely process through workflows to applications, people, or storage.

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For more information visit: uplandsoftware.com/AccuRoute