

A blurred background image of an office. In the foreground, there is a large stack of white papers. In the background, a man in a blue suit is walking and holding papers, and a woman in a dark suit is partially visible on the left. The overall scene is out of focus, suggesting a busy, fast-paced environment.

Solutions for the Legal Industry

Automating Document Workflows to Streamline Legal Processes

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

A Successful Calculation

The legal market remains one of the most document-intensive industries today. To adapt to an environment that's highly competitive and technology progressive, forward-thinking firms are devoting IT resources toward the transition to electronic records. Even so, massive numbers of paper documents still exist and must be managed. Is your organization ready to adapt?

Less Paper Firm

Document storage is expensive, time consuming and often, inefficient. Paper is volatile and susceptible to loss due to natural causes (such as fire or water damage), and is easily misplaced through human error. Since firms are liable for protecting client information, safeguarding content is critical.

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. Is your company doing everything it can to streamline paper processes, avoid needless delays, unburden employees from tedious work, and utilize valuable resources?

Business Continuity

Critical information comes in both paper and electronic documents, and that requires a smart, reliable solution to safeguard information. Are you protecting your sensitive documents from unauthorized access and disastrous business disruptions?

Don't bury your clients in paperwork. It's no longer acceptable to rely on yesterday's time-consuming, inefficient processes to manage the documents you face today. Fortunately, with AccuRoute, document capture and distribution can now be an everyday, front-office process that intuitively 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, routing documents and records to clients, co-counsel, opposing counsel and courts is costly.

Mailroom

More efficient processing and delivery means documents are in the hands of the attorney who is waiting for them.

Sharing

Collaboration is hard without costly print and copying costs.

Accessibility

Avoiding huge briefcases or constant requests to support staff who need immediate access to matter-centric information.

Privacy & Risk

Making sure documents are secure without 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, our enterprise class document process automation platform, to capture, process, deliver, and archive critical business documents.

AccuRoute delivers extensive legal-specific solutions with flexible, user-friendly configurations that can implement basic or comprehensive solutions that involve thousands or millions of documents per month. With AccuRoute, law firms can:



Capture

AccuRoute supports any networked-enabled, all-in-one 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, bookmarked 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, opposing counsel, and even e-file – all while providing a complete audit trail. You can also store documents in a DMS, network folders or document archives and cloud repositories such as Dropbox, Microsoft SharePoint, SharePoint 365, Box, and OneDrive.

“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**

Improving Document Processes in Legal Services

The AccuRoute platform can 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 can access the information they need with AccuRoute – anytime, anywhere, in any format. Using AccuRoute, firms can drastically cut document costs, improve productivity, accelerate workflows, and deliver consistent quality results to clients.

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

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

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 document management systems such as iManage, Microsoft® SharePoint®, Open Text eDOCS, NetDocuments®, World Software Worldox®, and Upland FileBound to name a few. Improving document accessibility strengthens team collaboration while lowering document management costs.

Records Scanning

Converting to electronic documents drastically reduces 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, couriating to opposing counsel, sifting through paper copies, and storing box after box. With AccuRoute, you can electronically scan, share, search, and store documents quickly, easily, and securely. Digitizing allows more thorough discovery cycles that are faster and less expensive.

Litigation Support

AccuRoute lets you import and centralize content into specialized systems like LexisNexis Concordance®, CT Summation, and FTI® Ringtail™ Legal. Share content with co-counsel and opposing counsel, streamline operations and client confidentiality with ease.

Accounts Payable Workflow Automation

AccuRoute's seamless capture and extraction capabilities and secure content repository provides law firms with the components necessary to centralize documents and metadata from nearly any source. Spend less time routing documents, chasing down invoice approvals, and correcting manual data errors, and more time practicing law more efficiently.

Disaster Recovery

Through its ability to capture, deliver, and manage mixed-mode (both paper and electronic) documents, AccuRoute ensures your critical documents are secure and available anytime, from anywhere. AccuRoute centralizes legal documents and conveniently stores, shares, and exchanges content while streamlining the continuity of your business. Your vital archives are safe from disasters or disruptions that could otherwise cripple your operation.

Court Filings

AccuRoute makes it easy to efficiently comply with the new mandates like electronic filing, by standardizing conversion to text-searchable PDFs and other formats, compression, document splitting (based on file size or page count), and delivery to multiple locations in a variety of formats.

Solution Benefits

- **Increase customer satisfaction** and save time when you automate processes and go digital with increased accessibility, allowing you to get back to your client 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 firms.
- **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.

A Jury of your Peers Agree

Over the years our clients have expressed the benefits they've received as a direct result of implementing AccuRoute solutions. From enhanced productivity to increased collaboration, streamlined document workflows, improved accessibility and extensive cost savings, here are just a few of their success stories.

Millions in Savings

Instead of having to relocate hardcopy files, this multinational leader in IP law implemented AccuRoute to streamline their document scanning and filing processes. They were able to access and retrieve files from anywhere in the world, on demand. This strategy helped them save millions in moving and storage fees.

Enhanced Productivity

This IP firm was able to leverage its existing docketing database, thanks to a custom integration with AccuRoute and Microsoft SharePoint. The firm's professional staff of 175 saw their previously tedious document workflows slimmed down to just a few processes, which saved the docketing team countless hours each day. What's more, the attorneys and paralegals no longer had to sift through piles of paper to locate the correspondence they were looking for. This resulted in increased efficiency throughout their high-volume, mission critical business workflows.

Increased Collaboration

This 370-person law firm needed a smarter way to close the time and productivity gap that various office locations created. Foremost, the attorneys needed to routinely collaborate on documents in near real-time. The solution was to use AccuRoute to scan documents and file content to a variety of destinations, in various formats all at once - simply by supplying a single user, client or matter number before scanning the file. The resulting environment was one that allowed the team to instantly access information, independent of location.

Improved Records Management

This high-profile 650-attorney global firm improved their records management through AccuRoute's document capture capabilities and integration flexibility. They tied AccuRoute

into their existing records management system to create a new solution that served as their case management tool, saving valuable processing time and improving overall records management.

Streamlined Document Workflow

This leading Canadian firm moves thousands of documents through its offices every day. They wanted to empower their 1,300 employees to handle the workload seamlessly and efficiently. By implementing AccuRoute as the foundation of its document capture and handling system, they scanned more than 400,000 pages into their existing document management and email system in just six months, ultimately streamlining the management of more than one million pages in their Toronto office alone.

Ease of Accessibility

This Boston, MA based IP firm processes nearly 200,000 documents a year. Their attorneys struggled with document management, and lacked one easily accessible central repository. With AccuRoute, they found a way to create comprehensive electronic files, take control over incoming faxes, and automate their mailroom. By designing one standardized, electronic, text-searchable PDF file they could easily import documents into their existing document management system, and make the documents accessible anytime, from anywhere.

Green Initiative Support

One of the world's largest law firms uses AccuRoute to help meet their green initiative by reducing reliance on paper. Through the use of this solution, they have significantly reduced paper by scanning documents, allowing any of their 1500+ employees to easily access information when they need it.

A Suite of Acclaimed Technologies to Streamline Legal Document Workflows

AccuRoute

AccuRoute's enterprise-class document process automation platform lets you cost-effectively capture, process, deliver, and archive critical business documents. AccuRoute offers 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 capitalize on faster, more efficient, and compliant document processes, while reducing associated costs, complexity, and risk.

AccuRoute Fax

AccuRoute Fax builds on 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.

AccuRoute Apps

As the newest user interface released in AccuRoute 5.1, AccuRoute Apps will become the workflow hub for all AccuRoute products moving forward. With functionality complementary to AccuRoute Queue and The AccuRoute Mobile Client, AccuRoute Apps allows for the entire platform to be more customized than ever before. Users will be able to "pin" and "unpin" their favorite workflows to their home screen, leverage image preview and release, and work with more intensive workflow options.

AccuRoute Connect

AccuRoute 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 business applications, or entering redundant data.

AccuRoute Mobile

Our mobile solution is an extension to AccuRoute's document capture platform that delivers highly distributed, mobile document capture capabilities to office workers with portable devices, so they can work and access documents from wherever they are.

AccuRoute Queue

Some document processes require manual intervention to review or manage deficiencies and exceptions—such as missing approvals or signatures. AccuRoute Queue lets you view in-process documents and automatically identifies areas that need additional review and expert intervention.

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 of security and full support for retention policies.

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.

About Upland Software

Upland Software (Nasdaq: UPLD) is an enterprise cloud software company that provides award-winning solutions in Project and IT Management, Workflow Automation and Digital Engagement. Our goal is 100% customer success, achieved through a unified operating platform that delivers the performance, scalability and support that over 2,500 Upland customers worldwide demand every day.