

## AccuRoute Solutions Brief: Records Scanning

For law firms today, on-demand capture has become a pervasive and mission-critical application. Whether firms consolidate storage space, move offices, or simply move documents as active cases close and paper files are stored, all firms are presented with a critical requirement: the need for high-volume scanning of their stored records. Digitizing records by scanning has become a firm imperative, and many legal IT teams are using on-demand capture systems to tackle this challenge.

### Challenge

Storing mountains of physical documents is costly, and it is notoriously difficult (if not impossible) to locate paper records without additional retrieval costs (time and money). Paper documentation is volatile, as it is susceptible to loss due to natural causes such as fire or water damage, or simply by human error and misplacement. This is problematic, as firms are liable for protecting client information and safeguarding content.

Additional records-related challenges include:

- **Expensive** record retrieval
- **Increased risk for error** with hardcopy documents
- **Difficulty capturing** complete records
- **Costly** on and/or offsite storage

### Solution

Simplify the process by automating correspondence and document ingestion into the firm's electronic document process, with immediate data extraction and document classification. With electronic delivery to fee earners and applications geared towards document review, assembly, and data-driven routing to reduce processing time, firms can eliminate sorting and data entry errors while improving processing time for billing.

Benefits of adopting a records scanning solution:

- **Preserve Client Content:** meet obligation requirements for information retention
- **Mitigate Risk:** reduce exposure to potential litigation from improper handling of records
- **Increase Information Accessibility:** allow for quick retrieval from secure, indexed files
- **Secure Client Records:** electronic files eliminate the possibility of destroyed or lost hardcopy materials

### Automating Records Scanning Processes

Whether a firm wants to go paperless, or simply 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.

## Planning for the Future

Today's firms are moving away from large brick & mortar offices, and are finding ways to thrive within smaller office spaces. To achieve the move, CIOs and records managers are finding ways to innovate away from the burdensome task of document storage. 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 related to digitizing their content.

*With AccuRoute implemented as the scanning engine for one London-based law firm, they saw a 50% reduction in required storage space for documents, and achieved over \$1 Million in savings prior to their office relocation.*

## AccuRoute in Action

AccuRoute is an intuitive document capture, fax, and workflow software solution. While hundreds of firms have adopted AccuRoute to fulfill the 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 mounting records scanning challenges.

## Batch Scanning Records

AccuRoute is highly scalable and can scan millions of pages a month. 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, and then efficiently scanned in a high-volume process, using routing sheets as separator pages.

## Scanning Closing Files

As active files move to closure and closing documents are prepared, paper files can be easily 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. Records information and locators may be indexed to provide easy access and retrieval once they are sent to storage.

## Image Review & Validation of Data

With AccuRoute Queue, document workflow application works as a "validation station" for records scanning in process. The staff performing the scanning can preview images and associated indexing information before releasing to electronic storage. Staff can also add quality control into your processes, by sending back for a rescan if the image quality is not sufficient.

## Scanning as a Service

Many firms leverage mailroom staff or facilities management staff to perform scanning as a service. Legal staff can quickly create "job tickets" or cover sheets containing key indexing information, the resulting document format, and delivery requirements. This means the service staff merely needs to gather and scan the documents without worrying about the document instructions. Document owners will then receive a delivery receipt of confirmation, all while staying where office staff is most valuable – at their workstation.

## 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.