



AccuRoute® Document Capture and Handling Solution  
For Legal Organizations



# Tell your documents where to go. . .

Law firms of all sizes, corporate counsel, and government legal agencies are driven by communication through documents. While some of these document communications happen electronically, many of the documents are still paper-based. Long before this paper is no longer part of the process, improved methods are needed to handle this paper for better and more efficient processes such as:

- Document Capture and Re-distribution
- Litigation Support
- Matter-Centric Environments
- Cost Recovery
- e-Discovery
- e-Filing
- Contract Management
- Disaster Recovery
- Vendor Invoice Processing

For example, with the adoption of e-filing, law firms will no longer experience the pain of long hours their support staff spends not only preparing the documents for delivery, but also the time spent driving to courthouses, fighting traffic, and trying to find a parking spot before the courthouse closes for the day. However, this drives the need for more efficient document handling procedures that often includes the need for conversion to a standard format such as a PDF file and compression of that document before delivery to its destination.

There is a solution. AccuRoute® is a document capture and handling platform combining the best of the digital and paper worlds — allowing for a simple, efficient, and controlled electronic distribution into a variety of information systems — simultaneously with one scan. AccuRoute provides enterprise-wide access, flexibility, and digital security that law firms require as they struggle to cope with the challenges of harnessing their paper documents, converting them to electronic formats, distributing those documents to multiple destinations, and archiving them for litigation support, e-discovery, and general safe keeping.

- **Capture** paper and electronic-based information for efficient document handling with distributed end-user access
- **Compatible** with any networked scanner, scan-enabled digital printer, copier, fax or multi-function peripheral (MFP), and accessible from any desktop or “smart” MFP
- **Convert** paper and electronic documents into a variety of formats including a text-searchable PDF, TIF, JPG, XLS, RTF, DOC and TXT file

- **Combine** paper and electronic-based information to create “mixed-mode” documents
- **Create** personal and public document handling rules that may be saved for reuse and are fully accessible from any “smart” MFP
- **Compress** documents up to 80% of original file size — reducing electronic transmission (bandwidth) and storage requirements
- **Communicate** information to various destinations and recipients simultaneously such as “send to” desktop, fax, e-mail, network folder and printers (with full enterprise fax capabilities from Omtool) and/or “save to” document repositories, document management systems (DMS), records management systems (RMS), enterprise content management and litigation support systems — even hand-held devices
- **Consistent**, user-friendly desktop interface that directly leverages existing applications eliminating the end-user’s need to learn proprietary screens by using native interfaces
- **Comply** with corporate record retention policies and document archive requirements with comprehensive tracking and reporting functionalities

## AccuRoute Enables Users to...

- Create customizable document capture and routing instructions for full control of file formats, delivery recipients, and storage/archive locations — including both personal and public distributions
- Define document distribution and workflows from the convenience of the AccuRoute Desktop Client
- Increase productivity with distribution rules that can be archived for “re-use” — eliminating redundant and time-consuming processes
- Through AccuRoute’s user-friendly desktop interface, utilize native interfaces from existing applications, enabling “in-the-business” workflows
- Engage document capture and handling where and when it is needed most. AccuRoute offers both “smart” MFP front-panel access and Desktop Client options to create the ultimate, flexible environment for your users
- Maintain comprehensive security, tracking, and auditing functionalities throughout the document capture, encryption, and distribution system to handle secure information deliveries (including fax transmissions)

## The Benefits of AccuRoute®

What kind of benefits can law firms reap from AccuRoute implementations? In a word: many. Already deployed in nearly half of the top 100 law firms nationwide and numerous small to mid-size firms, the AccuRoute solution is helping legal organizations address and solve key business challenges today.

Here are some of the common themes that run through the growing number of AccuRoute customers:



### Faster, More Efficient Workflow

Immediacy is at the soul of document distribution. So is the expectation that what is implemented today will be utilized tomorrow. AccuRoute's scalability and ease-of-use allows for immediate return on investment while laying the foundation for future enterprise content management systems and integrations. This coupled with the availability to archive and re-use distribution rules eliminates the need for redundant work and significantly enhances productivity.

### Fulfill e-Filing Requirements

e-Filing can introduce stringent requirements that must be adhered to in order to deliver your documents electronically. These include specific formats, destinations and file size limitations. Now, with AccuRoute you can convert your documents — even those in paper — to the required format and compress them to fulfill file size restrictions. In the event the file does not compress small enough, AccuRoute will enable you to easily split the file to deliver in accordance to specific court house requirements.

### Business Without Boundaries

Device independence is critical. Being able to work with any networked, scan-enabled digital printer, desktop scanner, copier, or multi-functional peripheral (MFP) allows for enterprise-wide deployment quickly and cost-effectively. Also, AccuRoute's flexibility protects your software against the inevitable changes of future, cost-effective hardware upgrades or new purchases.

### Improved Accountability and Compliance

AccuRoute, by design, is fully self-documenting — ensuring the ability to audit and retain every document. When considering new and changing legislation and the need to both retain and archive records, AccuRoute provides tremendous value.

### Improved Customer Satisfaction and Retention

Providing your clients the information they want, when they want it, quickly and easily, evokes satisfaction. AccuRoute enables this. You can also deliver matter-centric documents to multiple recipients simultaneously and re-use the list as often as you like for as long as you like.

### Reduction in Cost, Waste, and Risk

This is a continuous theme that emerges with AccuRoute customers. It is simply cheaper to control scanning and routing projects in-house than it is to outsource to an agency. Having the tools to manage sensitive case matter, control distribution and delivery, reduce unnecessary paper documents (via electronic storage), and provide enterprise-wide connectivity is a significant cost savings and one that should not be ignored.



### What is an Intelligent Routing Sheet?

In addition to accessing AccuRoute's advanced document capture and routing rules directly from the front panel of certain "smart" MFPs, AccuRoute is also designed to create Intelligent Routing Sheets that can be scanned using any networked scan device.

AccuRoute's flexible Desktop Client enables a user to select recipients — including document information systems — methods of delivery, and preferred file formats. AccuRoute creates an 'embedded directive' (routing rule) which is stored on the AccuRoute server and can be printed to a routing sheet as a barcode or character string. The routing sheet is scanned together with the document and delivered according to the user-specified directions, simultaneously with one scan. The routing sheet takes the place of typing on the limited front panel of a MFP, is re-usable, and eliminates multiple steps involved in processing documents for electronic delivery.

**. . . and what to do when they get there.**

## Omtool Customer Services

Omtool offers comprehensive services to help clients realize the immediate benefits of AccuRoute quickly and cost-effectively. Omtool's professional services include:

- Site survey, assessment, and recommendations
- Training, installation, and integration
- Advantage Support for maintenance, upgrades, and support directly from Omtool
- Full range of professional services including software customization and consulting services



## Connectors and Integrations

The need for communication through enterprise application integration has never been greater in today's legal market. The environment is motivating firms — large and small — to capture, exchange, and store data like never before. However, this need also requires an integration strategy at both the technological and executive levels. This only intensifies the already existing problem of incomplete solutions and accidental architecture until a solution can be implemented. Enter AccuRoute, an enterprise-wide document capture, conversion, and distribution platform.

AccuRoute provides a framework for integrating problematic and distributed systems, making it quicker and easier to combine applications so clients can integrate them into daily workflow processes that extend firm-wide. By reducing the complexity of the IT infrastructure, AccuRoute dramatically improves the flexibility, reliability, and scalability to support existing and new firm IT initiatives. Below are a list of Omtool's current connectors and integrations for the legal market. Other connections and integrations are available, please contact us.

### Document Management Systems

- Autonomy iManage WorkSite
- CA MDY FileSurf
- Custom DMS\*
- EMC® Documentum®\*
- HP TRIM
- Hyland® OnBase®\*
- Microsoft® SharePoint
- Omtool™ ObjectArchive™
- Open Text Document Management, eDOCS™ Edition
- World Software WORLDOX®
- Xerox® DocuShare

### Litigation Support Interfaces

- CT Summation
- FTI Ringtail™ Legal
- LexisNexis Concordance

### Cost Recovery Interfaces

- Control Systems Copittrak®
- Equitrac Professional®
- nQueue® Billback iA

### Records Management

- Autonomy RecordsManager\*
- Iron Mountain Accutrac®
- Open Text LegalKEY®

### Financial Management

- ADERANT Expert\*
- Elite Financial Management\*

### Omtool Legal-Specific Components

- Barcode Data Extractor
- DMS Conversion Tool
- Legal Option Pack
- Vendor Invoice Processing Suite

\* May require integration services.

## Compression

AccuRoute, through Adobe, provides advanced image file compression capabilities as part of its document capture and routing solution. AccuRoute's image compression engine within its Compose process takes the images from the server and compresses them with either a JBIG2 or JPEG compression technique. The result is a dramatic reduction in document size ranging from 50% to 80% smaller. As firms struggle to control data distribution and storage costs, a simple, easy-to-use compression solution is a valued benefit. This coupled with the federal judiciary's Case Management and Electronic Case Filing (CM/ECF) initiative, firms now have practical options of reducing their documents to the restrictive file size of 2 MB and filing them electronically.

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