

# AccuRoute<sup>®</sup> A User's Perspective

## Progressive Law Firm LLP

### Top 250 Law Firm Turns to Omtool to Increase Staff Productivity, Improve Document Accessibility, and Streamline Business Processes

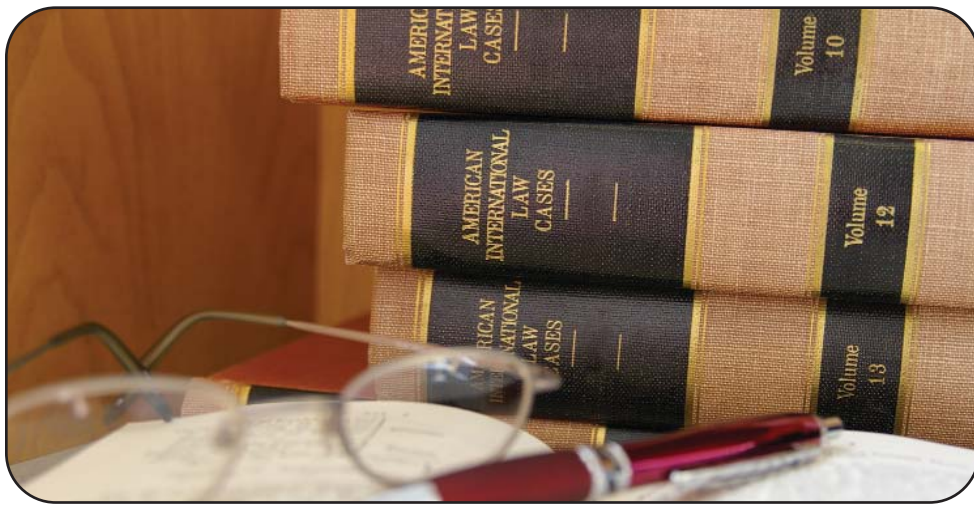
#### The Challenge

- Improve coordination across practices
- Reduce manual labor for document distribution
- Eliminate MFD or hardware-driven tasks
- High end user adoption

#### The Solution

AccuRoute provided:

- Distributed document handling
- Improved productivity
- Document distribution from the desktop
- Incredibly easy to learn application



From its founding in the early 20th Century, this “top 250” law firm has steadily grown by providing a broad range of sophisticated legal services in a range of practice groups, including labor/employment law, life sciences, venture capital/private equity, health law, financial services, corporate governance, and more. With more than 250 attorneys and eight offices in the mid-Atlantic, the firm serves clients ranging from national Fortune 500 leaders to startups, non-profits, educational institutions, and individuals.

The firm’s attorneys bring a unique cross-practice, multi-disciplinary approach to client service, to help ensure that clients benefit from collaborative teamwork and seasoned experience – regardless of where those attorneys are located. As a result, clients receive an exceptional level of expert advice and counsel from senior attorneys.

#### Seeking to Streamline

However, with such a distributed organization, it was a challenging proposition for the firm’s attorneys to coordinate their work across multiple locations. Different practice groups and teams found it

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— Director of IS

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### Streamline Processes

“There were numerous steps that wasted time; we wanted a way to streamline this process. We were hoping to eliminate our fax machines and invest in more robust, networked, scan-enabled devices and software that could work within our infrastructure and enable our attorneys and staff to share and file their documents more easily and more productively.”

Director of IS

difficult to share their many documents with far-flung co-workers. Previously, that meant a user would bring documents to a centralized multi-function device (MFD) to scan it to himself, return to his desktop computer to save the scan to a network (shared) drive or a central document management system (DMS), and finally electronically distributing the document to co-workers, clients, opposing counsel, or the court.

“This was a process that was unacceptably manually intensive,” said the firm’s director of information systems. “There were numerous steps that wasted time; we wanted a way to streamline this process. We were hoping to eliminate our fax machines and invest in more robust, networked, scan-enabled devices and software that could work within our infrastructure and enable our attorneys and staff to share and file their documents more easily and more productively.”

### AccuRoute for Hardcopy and Electronic Document Routing

Seeking a smarter way to share and route documents across multiple locations, this law firm began an evaluation of various applicable solutions. “Some of the other company’s offerings concerned us because they required a constant flow of pricey consumables and a lot of administrative hassles,” said the director of IS. “And requiring users to individually key in routing instructions would most likely create bottlenecks at devices and potentially some routing errors as well.”

Ultimately, the firm selected Omtool’s AccuRoute to capture, process, and distribute its paper and electronic documents. Unlike its competitors, AccuRoute does not require purchasing consumables or keying in instructions at the device. With AccuRoute, users can choose to work right from their desktop or by pressing a single button at the device, depending on their preference. The key to AccuRoute is the Embedded Directive – the encoded routing instructions that the MFD reads and follows.



**For Hardcopy Documents** – When routing hardcopy documents, the user places the Intelligent Routing Sheet on top of the document before scanning into the AccuRoute server. The Embedded Directive contained in the Intelligent Routing Sheet is sent to the AccuRoute server which “reads” it to identify the delivery specifications, processes the document, and deliver the content in the required formats based on user choices and delivery preferences.

**For Electronic Documents** – AccuRoute performs these same processing, delivery, archiving, and tracking steps on documents originating in electronic form, as long as the embedded routing instructions are included with the document.

In either instance, those routing instructions can contain several steps for distributing documents simultaneously, such as e-mailing, faxing, and archiving a document into most electronic information systems or translating the scanned information into a PDF, a searchable PDF, or a Microsoft Word file.

**‘One of the most efficient technology deployments in firm’s history’**

“AccuRoute presented many advantages to our firm,” said the IS director. “First, we liked the idea of enabling our users to work from their own desktops. There’s no requirement for them to go to the MFD to share a document. We also like the ability to reuse our cover sheets for common tasks and workflows – that’s a tremendous time saver for us. And the OCR processes of AccuRoute are very fast and accurate – more so than I thought they’d be, frankly. Ultimately, what’s led to such broad adoption in our firm is the ease of use of AccuRoute. Training was fast and so simple that it surprised our end users.”

The implementation – performed in conjunction with Pitney-Bowes – was performed by two integrators and three trainers. That training was held in an Open House forum in each office with documentation available on the shared network drive.

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### BLI Solutions Report

“The solution\* is compatible with any and all scanning devices that can scan to network folders. This flexibility is one of the solution’s greatest strengths. ... The solution scales effortlessly: when an organization expands, it simply purchases additional AccuRoute user licenses.”

Buyers Laboratory Inc.  
Solutions Report  
January 2006

\* AccuRoute Received  
Five-Star Rating from BLI

Today, attorneys in multiple states can now collaborate far more efficiently and share legal documents in seconds even when located hundreds of miles away – such as contracts, real-estate documentation, bond documents, appeals, client correspondence, and more. Popular uses for the AccuRoute solution include:

- Scanning to oneself
- Scanning to the firm’s DMS – Hummingbird DocsOpen (soon to be migrated to Hummingbird DM5)
- Moving documents to and from courthouses, opposing counsel, and clients
- Saving to litigation support systems (Summation and Concordance)
- Simple scanning to shared network drives
- OCR scanning of documents into Microsoft Word files

“This is one of the most efficient technology deployments in our firm’s history,” said the director of IS. “And that’s not just my opinion. We solicited opinions from our users: practice assistants, legal assistants, and attorneys all gave us a large volume of extremely enthusiastic comments. Besides the obvious boost in productivity, efficiency, and document availability, we’ve been able to reduce our on-site storage space requirements, too – even though our volume of managed documents is rising. That is saving us money and headaches. That wasn’t a primary goal when we deployed AccuRoute, but it has turned into an important benefit. Overall, AccuRoute has greatly improved our business processes, client service, and daily efficiency and productivity.”

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