

# AccuRoute® A User's Perspective

## Bromberg & Sunstein, LLP

### Bromberg & Sunstein, LLP Turns to AccuRoute® to Digitize Paper and Create All-Electronic Case Files

#### The Challenge/Need

- Electronic accessibility of documents
- Standardize document format
- Ease of use/flexibility
- Streamline case management

#### The Solution

AccuRoute provided:

- Improved intellectual property and document workflow
- Increased productivity through direct Interwoven connectivity
- Greater attorney accessibility and of all case files/documents



With 47 attorneys and 66 support staff, Boston-based Bromberg & Sunstein, LLP, provides legal representation with a focus on intellectual property, including patent, litigation, prosecution, and portfolio development. Trademark and copyright portfolio development and business transactions are also key areas of expertise.

The firm works with clients in a range of industries, including financial services, pharmaceutical, computer, semiconductor, electronics, and consumer products. For more than 30 years, the firm's ability to combine uncommon technical expertise with excellent legal skills has helped it achieve exceptional results for its clients.

#### Converting to Electronic Files

According to Monroe Horn, chief technology officer for the firm, Bromberg & Sunstein has made a strategic commitment to build what he refers to as the "electronic file." "Our objective was to give every attorney with a PC and a network connection access to the entire client file from virtually any location," he said. "Collecting electronic documents and e-mail didn't pose too great of a challenge. But when it came to paper, we struggled. We needed an effective way to capture the many paper documents that comprise a case file – such as correspondence, pleadings, evidence, and materials from



**Omtool's 2008  
Drive for Innovation Award  
Grand Prize Winner**



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### Solution Flexibility

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opposing counsel – and make them electronically accessible so that the entire case file was comprehensive, complete, and digital.

“We made a strategic decision to standardize our document workflow by using Adobe’s® Portable Document Format (PDF). What we needed was a way to digitize paper and create searchable PDFs that we could store in and retrieve from our Interwoven document management system (DMS).”

Bromberg & Sunstein had previously invested in a series of Canon multi-function peripherals (MFPs) and HP Digital Sender devices. The ability to integrate with and leverage those machines was the first of several key requirements. “We looked at a variety of different document handling solutions,” said Horn, “and during our evaluation process, we learned a few important things with respect to usability.

“The first is that – to achieve the greatest productivity – you want the user to spend as little time as possible at the MFP. A touch screen at the scanning device isn’t a great data-entry interface; it wastes users’ time and can create backlogs and queues as people wait their turn at the MFP while someone henpecks in different routing instructions. We wanted a solution that would let our people work at their desks and then simply walk up, place their documents into the document feeder, push a button, and let the system handle all of the conversions and routings. We wanted the utmost flexibility.”

### AccuRoute: Flexibility and Productivity for Attorneys

After completing its review of various commercial offerings, Bromberg & Sunstein selected Omtool’s AccuRoute to capture, process, and distribute its paper and electronic documents. The key to AccuRoute is the Embedded Directive – the encoded routing instructions that the MFP scans sending directions to the AccuRoute server for conversion and delivery. To route hardcopy documents, the user uses his desktop PC to define the conversions and destinations. AccuRoute translates those instructions into Embedded Directives that are printed out onto the Intelligent Routing Sheet that is placed on top of the document stack before scanning. The AccuRoute server “reads” those instructions on the top sheet to identify the delivery specifications, processes the document, and delivers the content in the required formats based on user choices and delivery preferences. AccuRoute also 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 text-searchable PDF, or a Microsoft Word file.

“We just love the flexibility that Omtool demonstrated with AccuRoute,” said Horn. “We looked at what our people needed to do each day. In some cases, it’s a secretary preparing a filing for a major litigation effort. Other times, she might be doing some routine scanning. In those cases, pre-defined, reusable routing sheets are extremely useful. In other instances, an attorney might be seeking to capture different documents for different cases or non-routine matters. With this system we have the flexibility to define the best processes for all our people – and then work AccuRoute into those processes.”

During the initial implementation, an Omtool engineer worked on site. “The implementation was very straightforward,” Horn said. “It took only a couple of days. Then we spent a couple of weeks to create the customizable configurations that we needed. We spent the most time learning how our people work and creating custom documentation for them. We created an extensive series of use-cases so that they had very specific instructions on how to use AccuRoute. We were determined NOT to simply show them a few features and leave it to them to figure out. Instead, we showed them the best way to do the things we knew they needed to do in their daily work.”

Mandatory training sessions for administrative staff took 30-60 minutes. Afterward, the implementation team conducted individual follow-up sessions with each staff person at his/her desk, helping them create their first Intelligent Routing Sheet – which was simply “make this document a PDF and e-mail it to me.”

### **It’s All in One Place – Wherever the Attorney Is**

Each year, Bromberg & Sunstein, LLP process more than 400,000 pages of paper documents. Capturing these documents electronically creates significant hard-dollar cost savings. But, according to Horn, the real savings extend far beyond that. “This system, frankly, isn’t just about cost savings,” he said. “It’s about giving our attorneys the information they need so they can represent our clients effectively and efficiently. We aren’t exclusively electronic yet – but we’re mostly electronic.

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### About Omtool AccuRoute®

Omtool’s flagship product, AccuRoute, is designed to be a enterprise-class, fully scalable document routing hub. By working with virtually any network-connected scan device or MFP and a myriad of information systems, AccuRoute becomes the foundation for all your document, capture, conversion, and communication needs from any source of documents to any destination or repository of documents. AccuRoute provides faster, more efficient workflows, while reducing cost, complexity and risk. Omtool solutions are used worldwide by businesses in document-intensive industries that demand secure handling, integration and tracking of documents in full compliance with a range of regulatory requirements.

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