

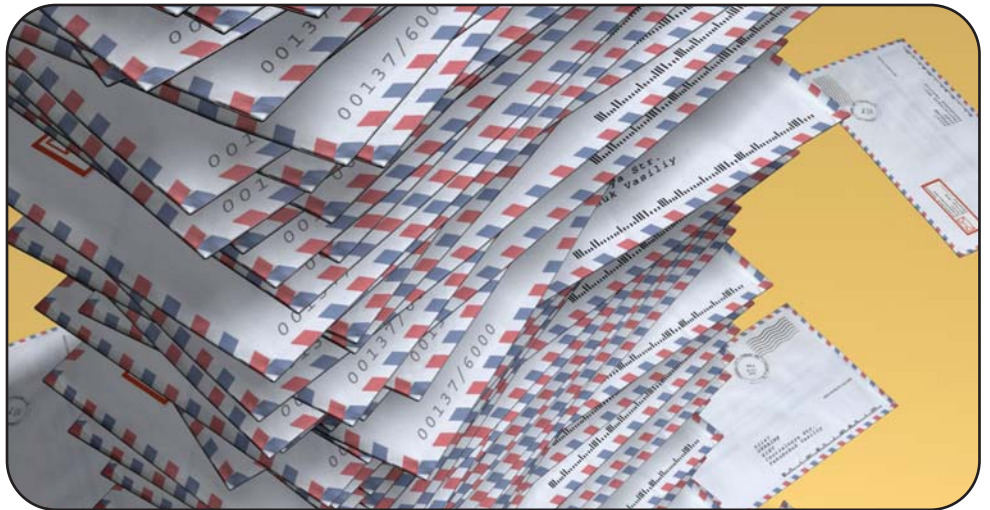
AccuRoute[®] A User's Perspective

Leydig, Voit & Mayer, Ltd.

AccuRoute helps IP Law Firm Unify Correspondence Procedures into a Single, Efficient Workflow

The Challenge

- Labor-intensive process to route, enter, and deliver inbound documents
- Inefficient method of moving documents into firm's docketing and content management system



The Solution

AccuRoute provided:

- Paperless workflow containing automated inbound routing instructions
- Streamlined process of capturing and storing documents directly into SQL docketing system and MS SharePoint
- Increased employee productivity and efficiency, while speeding up document availability

The Firm

When large corporations or individual inventors face difficult or unique intellectual property (IP) issues, they have turned to Leydig, Voit & Mayer. This firm has been at the forefront of intellectual property law for more than 100 years and enjoys an international reputation for excellence in all areas of intellectual property practice. The firm employs more than 80 attorneys and more than 90 law clerks, technical advisors, paralegals, and administrative personnel in four U.S. offices to provide counseling, litigation, licensing, and prosecution services to global clients in such fields as chemicals, computer hardware and software, consumer products, electronics, financial services, genetics, heavy industry, medical devices, machinery, and pharmaceuticals.

The Challenge

To manage the intake of its large volumes of documents, Leydig assembled a series of labor-intensive processes. Staff members processed inbound documents with separate workflows according to media type (fax, e-mail, and letters). They had to manually look up routing instructions, enter e-mail addresses by hand, and deliver paper-based letters without any electronic copies or tracking.

According to Phil Knox, IT director for Leydig, labor requirements were only part of the problem. "We were collecting e-mail in a public folder," he said. "Then we'd route it manually to print and copy it for docketing. We did the same for faxes. With letters, we copied them, manually wrote routing directions on the paper, and then manually delivered the paper to attorneys and docketing. As the



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Phil Knox, IT Director,
Leydig, Voit & Mayer

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volumes continued to increase, we realized this was an inefficient way to handle inbound documents and knew we had to find a smarter way.”

The AccuRoute Solution

To revamp correspondence intake, Leydig deployed Omtool's AccuRoute solution and wrote a custom application that integrates with its docketing database and Microsoft SharePoint[®]. AccuRoute now combines three previously independent workflows into a single workflow to process and deliver all inbound documents. The application automatically looks up routing instructions and inserts recipient e-mail addresses. In addition, the automated lookup also determines the document type, which then performs the correct routing rule into Microsoft SharePoint for review by appropriate docketing personnel.

“We're finally processing documents without printing, sorting, and manually delivering them,” Knox said. “Our docketing department uses this custom application to look up a case number or application number from our docketing database. Based on the information in the database, AccuRoute creates a workflow to automatically e-mail documents to recipients in the case record. If the document originated as a fax or e-mail, it is automatically forwarded with one click. If it arrived in hard-copy, we generate an AccuRoute routing sheet and scan the document using an MFP. AccuRoute delivers it without any intervention by docketing personnel. In addition, we upload the document to one of two Microsoft SharePoint lists based on case information in the database.”

The Results

The integration of AccuRoute with both the SQL docketing database and the MS SharePoint implementation has enabled Leydig to transform its docketing intake process into a paperless workflow,” said Knox. “Thanks to AccuRoute's automated lookup and delivery, our productivity has increased tremendously because we no longer have to route and copy mail. That's saving our docketing team hours of time every day.

“The application has also reduced the time required to get a document from docketing to a user/recipient. Attorneys and paralegals no longer have to sort through piles of paper to find the correspondence they're looking for. So they're more efficient and productive, too.”


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