



document process automation

Omttool
Legal Solutions

- Accelerate document workflows
- Increase accessibility
- Integrate paper with matter-centric environment

The Proven Foundation for Streamlined Legal Document Workflows

The Evidence is Clear

From depositions and contracts to court filings, invoices, and compliance/archiving requirements, in the legal industry today, document processing is all about high volumes, high speeds — and high stakes.

The fact is, it's no longer acceptable for law firms, corporate counsel, and government agencies to rely on yesterday's time-consuming, labor-intensive processes to manage the growing pile of documents they face today. The costs, delays, and risks associated with managing *all the paper* are far too high.

That's why more companies, agencies, and firms — including more than half of the U.S. top 100 law firms — are turning to Omtool **AccuRoute**® to streamline the capture, processing, and delivery of their legal and business documents. **AccuRoute** manages and improves virtually every aspect of the legal information flow:

- Documents and records
- Cases and matters
- Contracts
- Discovery
- Court filings
- Litigation support
- Cost recovery
- Vendor invoice processing
- Disaster recovery

Since they can access the information they need with **AccuRoute** — *anytime, anywhere, in any format* — legal teams and law firms can *cut document costs, improve productivity, accelerate workflows, and deliver consistently higher-quality results* to clients.

THE DOCUMENT CHALLENGES FOR LEGAL PROFESSIONALS

- **Space:** Onsite or offsite, it's expensive to store paper.
- **Couriers:** Whether it's local transport or overnight mailing, trying to get documents and records to clients, co-counsel, opposing counsel, and courts can be very costly.
- **Mail Room:** More efficient processing and delivery means documents are in the hands of the attorney who is waiting for them.
- **Sharing:** It's hard to collaborate without wasteful, expensive copying.
- **Accessibility:** It's either huge briefcases or constant requests dispersed support staff who need immediate access to matter-centric information.
- **Privacy and Risk:** Can you securely restrict access to your sensitive documents without reducing productivity?
- **Multiple Document Types:** Vital case information is in numerous sources and formats that are hard to search and combine.
- **Cost:** Whether it's materials, real-estate, or time — paper is more expensive than you think.
- **Eco-Footprint:** How can you cut the wastefulness of the paper chase?

AccuRoute can help to address all of these challenges — and more.



A Complete Solution for All the Paper

Savvy legal teams rely on **AccuRoute**, Omtool's enterprise-class document automation platform, to capture, process, deliver, and archive their critical business documents. **AccuRoute** uniquely delivers extensive legal-specific capabilities, flexible configurations, and the simplicity to implement basic or comprehensive solutions that involve thousands or millions of documents per month. With **AccuRoute**, law firms, agencies, and corporate counsel can:

- **Capture:** **AccuRoute** supports any networked scanner, scan-enabled digital printer, copier, fax, or multi-function peripheral (MFP) to capture all your paper documents.
- **Process:** Interchangeably convert your paper into a wide range of electronic formats: PDF and text-searchable PDF, Microsoft® Word and Excel, JPEG, RTF, TIF, and many more. You can even extract data from barcodes, validate the data, and "profile" your documents before archiving in your document management system.
- **Deliver:** After you scan, **AccuRoute** can *quickly, easily, securely, and automatically* deliver your document (by fax or e-mail) to yourself, internal colleagues, clients, opposing counsel, or other authorized stakeholders — all while providing a complete audit trail. You can also store documents in shared network folders or corporate document archives and repositories.

"We're not hunting down paper correspondence or trying to determine if anything's missing from a case file. It's all in one place — and that place is wherever the attorney is."

Monroe Horn, CTO,
Sunstein Kann Murphy & Timbers LLP



Smart Legal Teams Rely on AccuRoute

Documents and Records Management

AccuRoute provides a cost-effective, practical approach to document distribution and records management. You can easily and efficiently control, distribute, and store documents in a variety of document management systems such as Autonomy iManage WorkSite, Microsoft® SharePoint®, Open Text eDOCS, NetDocuments®, World Software Worldox®, and many others. When you need to locate a physical record, you can electronically identify the document within the record management system and locate the physical file. This improves the sharability of documents, strengthens team collaboration, and lowers document-management costs.

Case Management

AccuRoute is an ideal complement to case management systems by capturing and storing case-related critical documents. It also tracks and records each phase of delivery (including confirmation), so you have a time-stamped, server-based audit trail. Now, firms can bring paper documents into the fold for greater efficiency.

Contracts

AccuRoute captures, delivers, and manages critical contract information and conveniently stores, shares, and exchanges content while streamlining and accelerating contract-management processes. With **AccuRoute** you can integrate paper and electronic documents, meet strict compliance requirements, and strengthen document integrity and security.

Discovery

Forget the endless cycle of copying documents, couriering to opposing counsel, sifting through paper copies, and storing crate after crate. With **AccuRoute**, you can scan, share, search, and store documents electronically — quickly, easily, and securely. That more, thorough discovery cycles are faster and less expensive.

Court Filings

More court systems are mandating electronic filings for virtually every aspect of cases in their jurisdictions. For **AccuRoute**, e-filing can be a standard distribution process — thanks to easy conversion to text-searchable PDFs and other formats, compression, document splitting (based on file size or page count), and delivery to multiple locations in multiple formats. **AccuRoute** makes it easy to efficiently comply with the new mandates.

Litigation Support

AccuRoute lets you import content into specialized systems like LexisNexis Concordance®, CT Summation, and FTI® Ringtail™ Legal, centralizing critical case information. You can effortlessly share content with co-counsel and opposing counsel. Best of all, **AccuRoute** streamlines operations and protects the confidentiality of these sensitive documents.



Cost Recovery

AccuRoute can tie together the cost recovery and tracking features of popular systems such as, Copitrak®, Equitrac®, and nQueue Billback with your document capture, conversion, and delivery services so you have efficient, matter-centric cost recovery. This protects an important source of firm revenue.

Vendor Invoice Processing

AccuRoute accelerates the flow of invoices and related information through approval cycles and into standard legal financial systems. You can capture vendor invoices (by attorney or accounting department), collect client and matter billing codes, dates, and billing categories. Then you can process the invoice and send it with a scanned image for approval. Your team spends less time on administrative detail and more time helping your organization practice law more efficiently.

Disaster Recovery

Through its ability to capture, deliver, and manage mixed-mode (both paper and electronic) documents, **AccuRoute** provides an exceptionally valuable solution for protecting your documents and ensuring they are secure and available in the event of a disaster. **AccuRoute** centralizes critical legal documents and conveniently stores, shares, and exchanges content while streamlining and accelerating the recovery and continuity of your business after a disruption. Your vital archives of legal documents are safe from disasters that could otherwise cripple your operation.

AccuRoute Value: Better, Faster, and Less Expensive Legal Document Processes

Dramatically Lower Costs

- Cut your consumption of paper and related consumables
- Reduce your energy costs
- Decrease your real-estate and storage needs for paper documents
- Eliminate courier and overnight mail service fees
- Remove analog fax lines and traditional hardware to deliver documents
- Preserve your investments in hardware infrastructure
- Support heterogeneous environments

Improve Legal Compliance

- Comply with corporate record-retention requirements, government regulations, and industry mandates in support of your corporate clients
- Convert documents to required formats and sizes for e-filing compliance
- Access a complete, time-stamped, confirmed audit trail of who received documents and when

Increase Productivity

- Manage both paper and electronic documents in matter-centric environments
- Improve the sharability of documents for easy collaboration and immediate action
- Create electronic copies to reduce lost documents and misfilings
- Use your current applications (such as document management and litigation support systems) without the need to learn or adopt new systems
- Send documents to multiple locations in multiple formats from a single scan
- Accelerate your processes to improve client satisfaction

Reduce the Corporate Footprint

- Eliminate multiple paper copies to support green initiatives
- Preserve electronic copies of documents to prevent the complete destruction of documents due to a disaster



A Jury of Your Peers Agree

\$1 Million in Savings

Instead of relocating all of its hardcopy files, a multi-national leader in IP law implemented **AccuRoute** to streamline document filing, access, and retrieval from anywhere in the world. The strategy helped them save more than \$1 million in moving and storage costs alone.



Enterprise-Wide Document Collaboration

This firm of 370 lawyers and consultants needed smarter ways to share documents across six locations. Their attorneys use **AccuRoute** on any of 40 MFPs to scan documents to a variety of destinations in a variety of formats by supplying only a user number, a client number, and a matter number. Integration with the firm's nQueue Billback cost recovery platform supports client chargeback as well.

Achieving the Standardized PDF

The 45 attorneys at this Boston-based IP firm process nearly 200,000 documents a year. The firm now uses a standardized "electronic file" based on the text-searchable PDF format using **AccuRoute** and Interwoven. In addition to creating comprehensive electronic files, this system took control of the firm's fax management process and automated all incoming documents in the mailroom. Now, all the documents for any case are all in one place — wherever the attorney is.

More Productivity Using Microsoft SharePoint and Docketing Database

This IP firm's 175 professionals and support staff take in a huge volume of documents. Using **AccuRoute** and a custom integration with its docketing database and Microsoft SharePoint, the firm combines previously independent workflows into a simple process to deliver all inbound documents. The system saves the docketing team hours of time every day. And attorneys and paralegals no longer have to sort through piles of paper to find the correspondence they're looking for, making them much more efficient and productive.

Complete Accessibility and "Green" Benefits

One of the largest firms in the world uses **AccuRoute** in multiple offices supporting hundreds of attorneys to meet its green initiative. As a result, the firm has been able to significantly reduce paper and scanned documents are now accessible to any person in the 1,500-employee firm. Users are happy since documents that were traditionally either stored on individual PC hard drives or filed are now accessible instantly and anywhere in electronic format.

One Million Pages Per Year

This leading Canadian firm moves thousands of documents through its offices every day. **AccuRoute** is the foundation of its document capture and handling system — used by 1,300 employees. In six months, the firm scanned more than 400,000 pages into its DMS and e-mail systems. The Toronto office alone averages more than one million pages a year.

Efficient Records Management

This high-profile, 650-attorney global firm takes advantage of **AccuRoute's** direct integration with Open Text LegalKEY® to leverage its records management system and use it as a case management tool. Imaging and saving documents into LegalKEY is now fast and easy, saving the firm a significant amount of time.



“Before we implemented **AccuRoute**, we were voracious consumers of paper, with 1,200 lawyers in numerous practice areas spread across 20 offices around the world. We were processing tens of thousands of pages a day. Now using **AccuRoute** to scan and store documents, we have significantly cut our paper usage, improved cost recovery, accelerated collaboration inside and outside the firm, process invoices faster, and drastically reduced our outside storage cost.”

Jordan Gilder, Supervisor of Business Systems,
Weil, Gotshal & Manges LLP

The Leader in Legal Process Document Automation

For more than 20 years, Omtool has helped some of the world's largest corporations and leading law firms cost-effectively manage their document-intensive process-automation challenges. Continually refining its technology innovations, Omtool offers a platform with an architecture that incorporates our extensive experience in high-volume document processing to address *"all the paper."*

Today, **AccuRoute** provides the infrastructure for automating document processes in well over 300 law firms worldwide, including more than half of the top 100 law firms in the U.S. Our solutions are now the standard for firms of all sizes looking for enterprise-wide automation of their paper-centric processes. With our extensive experience automating processes involving millions of documents per month, multi-function device vendors, software and service providers, and law firms trust Omtool to handle all their paper-document process automation needs.

Find out more about how Omtool can help your legal team. Visit www.omtool.com or call **800.886.7845**.



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