



AVOID THE RUN-AROUND: SMARTER FACILITIES MANAGEMENT IN LAW FIRMS

Streamline Business Processes and Move Your “Runners” to Higher Value Work



Driving Your Information Route™



TABLE OF CONTENTS

LAW FIRMS STILL “RUN” WITH PAPER.....	3
ACCURROUTE: ELIMINATING THE DOCUMENT RUN-AROUND	8
OUTBOUND DOCUMENT ROUTING.....	9
INBOUND DOCUMENT ROUTING.....	11
BENEFITS OF ACCURROUTE	13



LAW FIRMS STILL “RUN” WITH PAPER

Are paper documents heading toward obsolescence in law firms? Hardly. In fact, despite the persistence of the “paperless office” myth, the use of paper documents continues to grow exponentially. Researchers at the School of Information Management and Systems at the University of California at Berkeley have been tracking the growth of information, including that printed on paper. In their 2003 study, they say, “The amount of information printed on paper is still increasing, but the vast majority of original information on paper is produced by individuals in office documents and mail.”

More than perhaps any other industry, the legal profession depends heavily on the quality and availability of documents. They can be created electronically and exchanged among partners, clients, colleagues, and opposing counsel. Sometimes they’re sent by e-mail or fax. Other times they’re printed and faxed, couriered, mailed, or filed and archived. With so many different types of documents in so many different forms and formats using so many different communication channels, document management is a mission-critical challenge for law firms today.



From contracts and filings to evidence and incorporation records, law firms invest enormous sums of money in systems and labor – including employing the ever-present knowledge workers and “runners” – to capture, manage and deliver those documents. Yet, too often, law firms endure needless delays, costs, risks, and problems simply managing the day-to-day documents that are integral parts of their professional workflow. Consider some of the “running” challenges:

- **Labor Costs** – Manually handling, routing, and filing documents is an inherently slower and more costly proposition than their electronic counterparts. Even at lower salary rates, the costs for employing runners add up. And assigning them to low-value paper-shuffling carries its own opportunity cost.
- **Inefficiency** – Paper documents are inherently inefficient. For instance, when an important fax arrives for delivery to multiple recipients, the runner must make an appropriate number of copies and then physically walk to different offices to hand-deliver it – perhaps on multiple floors – or re-fax or mail it to other office locations. That takes valuable time.
- **Accuracy** – With legal documents, accuracy is paramount. If you assign a runner the task of faxing a document, scanning it into your document management system, and converting it into a PDF and e-mailing it to another party, you need your instructions followed explicitly. Unfortunately, your



request will be one of dozens that runners will deal with in any given day. Human error is all too inevitable – and those slipups or delays can have a damaging impact on your clients and firm.

- **Distributed Organizations** – In many law firms, partners and associates are in different cities around the country. That creates needless shipping delays (or requires lower-quality [and more expensive] faxing for smaller volumes). Different practice groups might be in the same building – but many times they’re on different floors in large downtown office buildings. Those kinds of physical-proximity issues make it difficult, costly, and time-consuming to share documents among team members. Runners can take hours or days and introduce a potential risk of document loss.
- **Archiving and Sharing** – To cut real-estate costs, many firms use off-site archives for documents that are no longer considered “live.” While that may save the firm money, it creates major hurdles when it comes time to retrieve a certain needed document quickly and efficiently. Delays of many hours or even a day or two are typical if runners or couriers must retrieve documents from off-site.
- **Integrating Paper and Electronic Documents** – Many firms want to scan paper documents into content-management and records-management systems. However, some scanning options require expensive dedicated scanning hardware and servers and high costs for training and labor.



- **Conflicting Formats** – Firms are seeking ways to bring paper, fax, and electronic documents (which, themselves, have multiple formats) into one cohesive system.
- **Security** – Whether it’s paper or electronic documents, firms need to control access and ensure delivery to proper recipients. Due to confidentiality issues, you might not want to have runners eyeing sensitive documents while scanning or copying.
- **Turnover and Training** – Due to the entry-level nature of the lower-salary, lower-skill position, runners often have relatively brief tenures in many law firms, which can create too-frequent cycles of recruitment and training.

Unfortunately, in many firms, document management has remained mired in costly, inefficient, and outdated manual processes that rely on expensive labor and dedicated, complex equipment. It usually falls to the “runner” to make copies, send and receive faxes, send and deliver company mail and shipments, and scan and file documents.

Many firms have attempted to manage their document flows by contracting with outsourced “Facilities Management Service Providers.” According to recent research



from Datamonitor, more than 75 percent of large firms outsource their facilities management functions – essentially providing the equipment and runners at pre-set fees and governed by service-level agreements.

Those SLAs explicitly define all aspects of the services, from how fast a received fax is delivered to a partner to how many times a day postal mail is delivered or picked up. While an outsourced FMSP can bring economies of scale, best practices, and updated equipment, the work model is largely the same as an internal model. It depends on manual labor to move documents, and is a costly way to handle processes.



AccuRoute: ELIMINATING THE DOCUMENT RUN-AROUND

Both law firms and outsourced facilities management service providers continue to seek new alternatives that bring greater speed, intelligence, accuracy, and security to document management while lowering costs and shifting the burden from runners to automated solutions. AccuRoute responds to the mandate to eliminate the document run-around and streamline the management and movement of legal documents.

AccuRoute is the document routing hub that collects content from various sources (hardcopy, e-mail, fax, or data streams) processes it (such as converting from one format to another and compressing it), composes it (such as adding cover pages and merging documents), and passes the finished product to the various delivery destinations such as recipients, archives, or output devices.

AccuRoute tracks and records each phase of delivery and confirms final delivery. The result is a time-stamped, server-based audit trail of where the document came from, what was done to it, and where it went, along with an archived copy of the “message and attachments.”



The key to AccuRoute: **the AccuRoute Embedded Directive**. The Routing Sheet containing the embedded directive is created using the AccuRoute desktop application and provides the intelligence that makes ordinary hardcopy documents behave in extraordinary ways.

The Intelligent Routing Sheet contains all of the routing and delivery specifications (including recipient data, method of delivery, final file type, profile data for archiving, and more) both in list format and encoded in a way that only the AccuRoute server can decode and execute. For convenience, these routing sheets can be used again and again, or stored electronically as PDF files for distribution to remote offices or for use in routing electronic documents.

OUTBOUND DOCUMENT ROUTING

To use a routing sheet to distribute hardcopy documents, the runner simply places it on top of the document, scans it using a networked multi-function device, and sends it electronically to the AccuRoute server. AccuRoute “reads” the document to identify the string of characters (the embedded directive) that contains the delivery specifications. Once it locates the embedded directive, AccuRoute processes the



document and delivers the content in the required formats based on user choices and delivery preferences.

It's the same with electronic documents, as well. AccuRoute can perform these same processing, delivery, archiving, and tracking steps on documents originating in electronic form, as long as the embedded directive (or the entire intelligent routing sheet) is also included with the document to be routed. That bypasses the runner entirely – improving the speed, accuracy, and cost of handling documents.

You can also create a series of reusable embedded directives that are stored on the AccuRoute server enabling quicker document routing, tracking, and archiving, especially for repetitive tasks. This is an ideal way to quickly route electronic documents to a fairly static distribution route and a common archive – such as an online resume folder targeted to a specific job opening or department.

Lastly, users can access AccuRoute directly from the front panel of specially-equipped MFP models. Using Java technology, AccuRoute can be engineered to enable users to access pre-configured personal or public distribution rules through the MFP's front panel directly, which eliminates the need for printing a Routing Sheet and is ideal for repeatable processing and distribution on the fly.



INBOUND DOCUMENT ROUTING

Adding the fax component to AccuRoute provides users with a variety of inbound document routing options to streamline many different business processes. You can include an embedded directive in a fax cover page and e-mail it to the sender (e.g. e-mail the final proposal, with the cover page. The e-mail recipient prints the proposal, signs it, combines it with the embedded directive fax cover page and faxes back to the originator).

AccuRoute receives the fax and automatically routes the document

ACCURATE IN ACTION WITHIN THE LAW FIRM

Documents for a specific client arrive in a variety of formats, but the distribution must be limited to attorneys on that client's team. The runner receives (via courier) a document that must be reviewed and immediately distributed to the team. The runner must efficiently distribute the document to the entire team. From there, the employees working on that specific client matter must:

- Place the contents into the client file, being sure to reference the matter designation previously assigned
- Scan the document
- Convert the document to a text-searchable format using OCR technology
- Import the electronic file into the firm's content management system (document or records management system)
- Name the document
- Document all of the steps involved for cost control/recovery and as proof that the document was received and properly catalogued and filed
- Notify the team that the document is available in the repository or send each a copy as necessary

AccuRoute provides an effective, multi recipient, multi-channel method for document exchange and archiving -- for both hard copy and electronic documents. AccuRoute connects to the document repository enabling the runner to not only create a list of recipients but also archive the document -- or forward it to a paralegal for validating and filing. The Intelligent Routing Sheet provides the server all of the document routing and archive instructions including validation of client matter data. When included in an e-mail with a document attachment and sent to the server, the PDF version of the routing sheet provides the same automatic routing instruction for any electronic document.

Electronic or hardcopy -- no matter what the document's origin, AccuRoute effectively and efficiently routes, tracks, and logs the entire document exchange process automatically.



according to the delivery parameters defined in the embedded directive. This is an ideal way to initiate a process where the documents will eventually be scanned and entered into a processing queue. Using the cover page in this manner pushes the scanning function out to the sender – effectively using their fax machine as a document capture device – eliminating the cost and delay of having to “image” the document at a later step in the process. The faster the document gets into the queue, the faster the customer gets a response.

AccuRoute FaxCenter is a desktop application that acts as a “manned” dispatch center for incoming faxes. With FaxCenter, the runner forwards only legitimate fax messages to the legal staff – insuring that their inboxes remain free from “fax clutter.” In addition to simple routing, critical faxes can be annotated, combined, profiled, and archived (and archived in a separate fax database in case the original is lost) and forwarded to an individual or group as the content dictates.



BENEFITS OF ACCURROUTE

- **Support for Rich, Complex Document Environments** – AccuRoute enables lawyers, knowledge workers and runners to work with diverse document formats without added complexity or unnecessary structure. AccuRoute handles the widest possible range of input sources and devices and converts, processes, and manipulates information flexibly to and from various formats. For example, you can convert a PDF document into a working text file that you can manipulate with a standard word processor before converting it back to a PDF. Or you may want to scan a paper document using optical character recognition to eliminate re-keying.
- **Flexibility for *Ad Hoc* Document Lifecycles** – Users can't always control when, how, and in what format documents enter and leave their workflows. In fact, most document processes and lifecycles are almost stubbornly *ad hoc*. AccuRoute helps runners respond to the impromptu, unstructured needs of your firm.



- **Smart Delivery and Tracking** – AccuRoute uses electronic receipts and audit trails to direct and track documents.
- **Records Management** – While most documents at a law firm are “in-process” materials, you also need to manage records – finalized legal documents. AccuRoute lets you scan in a physical record and instantly share the image electronically with any other authorized viewer, perform searches, convert it into a different working document, or work with it in other ways. This is a particularly important requirement for multi-office, distributed law firms.
- **Deriving Greater Value From Previous Investments** – Given that documents are the lifeblood of every law firm, it’s not surprising that firms make strategic investments in their copying and printing technology. However, the power and functionality of those devices remain largely untapped. Most new hardware purchases are digital devices – but there are few applications in place to leverage what is largely latent technology. AccuRoute better positions the law firm to derive greater value from those substantial technology investments.



- **Reuse of Document Content** – It’s no secret that many legal documents build on passages (large and small) from previous documents. The last thing an attorney wants to do is “reinvent” text that he’s previously written. AccuRoute enables reusability to improve teamwork, improve document quality, increase collaboration, and share knowledge.
- **Simplicity** – Manufacturers shoehorn as much “functionality” as possible into a near endless sequence of buttons and screens – all displayed on a device panel “screen” that is about the size of an index card. AccuRoute is easy for runners to use, with an intuitive interface grounded in a familiar user experience.
- **Litigation Support** – In litigation support, documents are of paramount importance. AccuRoute makes it easier for records managers to import content into specialized litigation support systems (such as Summation and Concordance) and create case databases that enable easy access and quick document searches, as well as produce content for co-counsel or opposing counsel. This can help you avoid the costs, delays, and potential confidentiality risks of outsourcing your litigation imaging.



- **Disaster Recovery** – No law firm can afford to leave its document assets vulnerable to floods, fires, other natural disasters, or even terrorism or civil unrest. AccuRoute can be an integral part of a comprehensive business-continuity strategy by enabling you to create copies of your documents and records and store them off-site and off-line.
- **Privacy and Security** – AccuRoute lets your users control shared devices (copiers, printers, scanners, and faxing) from their desktop computers, and sidestep accidental disclosure or mis-delivery.
- **Cost Recovery** – Traditionally, paper-handling has been a significant profit center for many law firms. AccuRoute lets you accurately capture and bill document-handling charges. Just as important, it integrates with popular cost recovery systems such as Billback, Control Systems, and Equitrac, helping you fully document and recover your costs.
- **Improved Productivity** – Ultimately, of course, AccuRoute frees your runners from mundane manual tasks and enables them to devote their time to higher-level activities that contribute more value to the firm.



About Omtool, Ltd.

Omtool, Ltd. is a leading provider of document handling solutions that simplify the integration of paper and electronic documents in enterprise information management systems. Our flagship product, AccuRoute, streamlines the capture, conversion and communication of paper and electronic documents, enabling fast, secure, simultaneous distribution to multiple destinations in multiple formats. Available at any network-enabled scan device or from users' desktop computers, 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. Based in Andover, Massachusetts with offices in the United Kingdom, Omtool can be contacted at 1-800-886-7845 or www.omtool.com.

Corporate Headquarters

Omtool, Ltd.
6 Riverside Drive
Andover, MA 01810
Tel: 978.327.5700
Fax: 978.659.1300
Sales: 800.886.7845

Omtool Europe, Ltd.

25 Southampton Buildings
London WC2A 1AL UK
Tel: +44 (0) 203 043 8580
Fax: +44 (0) 203 043 8581

www.omtool.com

Omtool, AccuRoute, and the Company logo are trademarks of Omtool, Inc. All other tradenames and trademarks of other companies appearing in this document are the property of their respective owners.