

AccuRoute[®] A User's Perspective

Heller Ehrman LLP

AccuRoute Integration with Open Text LegalKEY[®] Streamlined Document Capture, Storage, and Sharing

The Challenge

- Manual, time-consuming process of getting documents into firm's LegalKEY system
- Lack of accessibility of content across all electronic information systems



The Solution

AccuRoute provided:

- Direct integration with LegalKEY records management system
- Streamlined workflow to create accessible electronic records across the firm

The Firm

Heller Ehrman LLP was a leading provider of global legal services (firm closed as of September 29, 2008). With 650 attorneys and professionals in the United States, Europe, and Asia, the firm offered a full range of litigation, business, and intellectual property practices. Heller Ehrman represented a wide range of organizations, from entrepreneurial, technology-driven enterprises to established, global corporations. The firm was involved in several of the largest antitrust matters in the world, including representation of Microsoft, Texas Instruments, Inc., Visa U.S.A. Inc., Kohler Co., and Weyerhaeuser. The firm was named a premier "Bet-the-Company" law firm by BTI Consulting Group in its 2007 report and was recognized by American Lawyer Media as a "Go-To Law Firm" for financial services companies in its 2008 survey.

The Challenge

Like most law firms, Heller Ehrman processes enormous volumes of documents. Early efforts to automate document capture were based on an internally developed application to capture scanned images of documents that were then stored in the firm's Open Text LegalKEY system for records management. According to Leigh Isaacs, Firmwide Records Manager for Heller Ehrman, the firm needed more. "Our previous workflow required that all documents be imaged and saved in LegalKEY," she said. "That gave us the ability to share documents and make them available to other electronic systems, our extranet, and in daily reports. But that process required multiple steps. A paralegal, for instance, would have to scan the document to an e-mail account, copy it to the desktop, then move it to LegalKEY. That not only took too much time, it also required a



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About the Firm

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Leigh Isaacs, Firmwide Records Manager, Heller Ehrman LLP

subsequent cleanup of extra electronic copies. It worked - but it was cumbersome. We needed a more robust method that was faster and easier.”

The AccuRoute Solution

To streamline its document capture and routing, Heller Ehrman deployed Omtool's AccuRoute solution in conjunction with the firm's fleet of digital MFPs. "AccuRoute's direct integration with LegalKEY enables us to leverage LegalKEY not only as a records management tool, but also as a case management tool," Isaacs noted. "AccuRoute has been the missing element for us to create a new, efficient workflow for saving imaged documents into LegalKEY. From there, we can include those images in virtual, daily distribution reports and on our extranet."

The Results

AccuRoute enabled Heller Ehrman attorneys, paralegals, and administrative staff to easily send hardcopy and electronic documents to LegalKEY for sharing and collaboration. "We're much more productive with AccuRoute in our workflow," Isaacs said. "Our records staff uses AccuRoute for scanning and saving documents into LegalKEY. It has enabled us to transition the bulk of our non-billable work from our higher-salaried billable professionals to the records department. That means our billable team can focus more on client matters, which increases our revenue and profitability.

"AccuRoute's integration with LegalKEY provided us with the final piece of the workflow puzzle for capturing documents. It has streamlined our work processes and enabled us to assign work to the most effective cost centers. Imaging and saving documents to LegalKEY is now quick and easy and saves a significant amount of time, allowing our team to provide more timely, revenue-generating client services."

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