



White Paper

Overcoming the Challenges in Preparing Documents for Electronic Filing

The challenges facing the legal industry are not conventional by any means; therefore, they require flexible and streamlined solutions that address security, technology and efficiency issues

August 8, 2007 | Charlie Sim

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State Courts using a State-Wide Electronic Filing System

- Arizona
- California
- Colorado
- Connecticut
- Delaware
- District of Columbia
- New Jersey
- New York
- North Carolina
- North Dakota (pilot program)
- Ohio
- Texas
- Washington

Overview of the Legal Industry

It's no surprise that the legal industry is a fast-paced, results-oriented environment where time is money. Attorneys need to prepare and file documents as fast as possible and as accurately as possible. Many hours are spent researching, organizing and preparing hundreds of records and documents for a single case. In addition, because courts have differing standards on accepting filings and e-filings, document preparation can be both complicated and confusing.

The challenges that face the legal industry require solutions that buck conventional approaches. These new challenges require law firms to synergize ideas and apply solutions that are both flexible and durable.

Varying Rules from Jurisdiction to Jurisdiction

In a time when law firms are merging and acquiring smaller firms, and courts and jurisdictions are increasingly accepting e-filings, standards for document preparation have never been more critical. The challenge for many law firms these days is how to prepare for cases while preparing documents to fit widely diverse criteria using emerging technologies.

Law firms need solutions that help them submit filings to courts that do not accept e-filings, but only accept conventional paper documents. In addition, law firms also need a solution that support e-filings that are subject to varying standards and formats, such as Word or PDF, and varying versions. Maintaining compatibility with numerous jurisdictions is a logistical and administrative challenge that needs a flexible solution.

Increasing PDF Usage

With the legal industry's increasing dependence on Adobe Acrobat and the PDF, problems in dealing with document organization and preparation need to be addressed head-on. More courts, including Federal Jurisdictions, are adopting PDF as the standard for e-filings, but they are unsure how to standardize filings. What version of Acrobat should be used? Should filings be backward compatible with older versions? And other such questions still linger in the minds of court officials.

Heightened Security Concerns

In addition to questions about PDF standards, a large question about security looms overhead. In the wake of 9/11, information has been regarded as a vital key to the safety of any society. How can firms and legal authorities keep their information safe? And how can they ensure their preservation in the face of a terror attack or natural disaster?

As legal firms prepare documents for an e-filing, they are concerned with not only the obstacles mentioned above, but in executing the process in as little time as possible with the least amount of errors. ISIToolBox Legal Edition helps law firms do this – and much more.

ISIToolBox Legal Edition

ISI's answer to the needs of the legal industry is ISIToolBox Legal Edition. This premiere collection of tools allows users to prepare documents as quickly and as accurately as possible. It also addresses the issue of document security and preservation, as well as meeting document standards and ensuring the quality of pages. From the inception of a case to its closing, ISIToolBox Legal Edition helps law firms improve efficiency while enhancing document security and integrity.

Get In, Get Out, Get Done

Because attorneys and the legal professionals (paralegals, legal assistants, etc.) who support them are too busy to spend time learning a new application, they need a solution that can give them the results they need in as little time as possible. In effect, they need a solution that is easily navigable, intuitive and simple to use.

Streamline the Discovery Process

From the time a case is born, ISIToolBox helps firms enhance productivity and efficiency during the discovery process. First year associates can bookmark, redact and enhance documents easily while senior level attorneys are involved in the strategic planning.



Redact with Ease

Documents can be submitted, then easily redacted while still being consistently tracked. The result is an easy document preparation process. With iRedact, users can white out, black out or replace any text within a PDF. Simply drag a box around the area you want to white out or replace, and the process is automated. Use it also to easily search and replace text.

Also, iRedact allows users to remove confidential content from PDFs before and after filing documents for adding security.

Correct and Enhance Documents

As records and papers are scanned to be included in case reports and document filings, they may need to be altered. Whether it's cleaning stray marks, borders or removing hole punches in pages, there's a tool to help users ensure the quality of pages.

Scanned documents can be corrected if flawed, by removing unwanted lines and marks. Users can easily clean edges, eliminate line gaps, crop images and text, correct inverse text, and shade or desaturate images.

Reuse and Save Time

Add Bookmarks and Hyperlinks

Bookmarks and hyperlinks can be added to documents for easier navigation and organization. Users can automatically add bookmarks by font information, automatically converting headings into bookmarks, and hyperlinks using keywords. Scanned documents can also be bookmarked easily.

By using ISIToolBox Legal Edition's bookmark and hyperlinking tools, reviewers have at their fingertips all the useful information they need. Senior litigants will also find the linking of supporting content and documents valuable as they can easily create inter-document navigation.

Number Pages Easily

All pages in a document can be numbered throughout a document and customized to fit your needs. For example, number prefixes and lengths can be altered for page standardization.

Get Results with Fewer Clicks

ISIToolBox Legal Edition provides users with toolbars that contain all of the tools they need to prepare documents successfully. Not only do the buttons and toolbars give users immediate access to important functions, they also eliminate the need to click through multiple dialog boxes. The result is quicker execution of commands and less time spent on navigating through menus.

Intuitive Navigation

The toolbars can float or can be docked at the top of the user's screen to allow for easy access. By looking at the icons on the toolbars, users can determine the tool that they need with a quick, cursory glance. And because ISIToolBox's tools are integrated into Adobe Acrobat, the tools can also be accessed through Acrobat's conventional menus as well.

Safeguarding Important Documents

Each record and document in a single case is important – so important that in light of today's security-sensitive times, law firms are becoming more acutely aware of the need for reliable safeguarding of information. To protect the integrity of each record, ISIToolBox Legal Edition and Adobe Acrobat provides safety features that allow users to lock and set permissions and validate documents with page stamping tools.

More Secure than Microsoft Word

With Adobe Acrobat, users can share documents and allow certain users to make changes or to view them based on permissions. Changes made to documents cannot be seen by other users, in contrast with Microsoft Word. In addition, ISIToolBox's stamping tools allow users to validate and certify documents according to their needs.

Create Electronic Archives

Law firms and courts will eliminate document storage and management costs simply by converting records and papers into electronic documents. Not only will these archives be easily accessible, they can be bookmarked for easy searching. Documents will also include Tables of Contents that are also dynamic, allowing users to get the information that they want with a few mouse clicks.

Compatible with DMS

ISIToolbox Legal Edition can easily integrate with any DMS, whether a file-storage approach, an online manager, or a logical XML arrangement. DMS compatibility allows users to use their current document management systems without having to upgrade or change their existing system.

Preparing for Court e-Filing

Courts and jurisdictions have differing requirements when it comes to e-filing. They may require files to be sent at a specific size range. If the document is being submitted is too large for the court, it doesn't have to be rejected. Instead, simply separate the document into multiple files.

Separate PDFs into Multiple Files

ISIToolBox Legal Edition allows users to have total control over where documents are split without having to worry about modifying bookmarks

Standardization helps cut costs in a myriad of ways – from saving time in preparing and submitting documents in filings, to less time spent on reviewing and accepting filings.

or hyperlinks. Users can separate PDFs into multiple documents according to level-one bookmarks or a specified page range or set number of pages. Bookmarks and hyperlinks are automatically updated.

In addition, pages and records can easily be merged together through the Merge PDF tool.

The Benefits of Standardization

The legal industry will benefit significantly from standardization of e-filing and filing requirements. Standardization helps cut costs in a myriad of ways – from saving time in preparing and submitting documents in filings, to less time spent on reviewing and accepting filings. In addition, it simplifies the need for a number of different software applications and formats into one user-friendly application and one easy-to-understand format.

With standards in place, users will save documents that apply to a specific jurisdiction, and use it as a template to submit documents quickly for the next time when filing to that jurisdiction. ISIToolBox Legal Edition enables users to do this effectively.

In addition, as courts become more accepting of e-filings and as their technology to review and receive e-filings improve, law firms that do not have the ability to impose standards already in place will have to spend time catching up. Instead, with ISIToolBox Legal Edition, law firms will already have the capability to produce standardized and compliant e-filings without the need to upgrade or enhance their current technology.

Applicable Across Practice Areas

All of ISIToolBox's tools can be applied across practice areas, no matter what services legal firms are providing. ISIToolBox Legal Edition can help overcome any document preparation challenge in:

- Antitrust/Trade Regulation
- Corporate & Securities
- Environmental Law
- Technology Transfer
- Litigation
- Intellectual Property
- Labor and Employment Compliance and Litigation
- White Collar Crime and Corporate Compliance
- Trademarks
- Mergers and Acquisitions
- Software Licensing
- Venture Capital Financing
- Medical Device Litigation
- Building Financing
- General Commercial Litigation
- Benefit Plans

Summary of Benefits

ISIToolBox Legal Edition helps law firms to overcome the challenges facing the legal industry. It does this by:

- safeguarding document security
- ensuring document integrity
- preparing documents for e-filing
- applying efficient tools for document preparation
- being applicable across multiple practice areas
- streamlining the discovery process
- offering tools that are easy to use and simple to navigate
- creating electronic archives and eliminating paper processing
- create documents for paper or electronic filing
- preparing law firms for future standardization in e-filings
- cutting costs associated with document review

About ISI

Founded in 1992 by President and CEO Jinsoo Kim, Image Solutions, Inc. has played a pioneering role towards the acceptance and standardization of PDF-based electronic submissions. ISI is a solutions provider aimed at serving regulated industries, including the Life Sciences, Government and Legal organizations. Today, ISI is a recognized leader in the area of document preparation and electronic submissions around the world.

For more information about ISI, visit us online at: www.imagesolutions.com.