How Top U.S. firm Shook, Hardy & Bacon automated OCR, resulting in more litigation items being filed in less

The business need

Meet the technical requirements of U.S. court filings including text searchability, file size, and format

Automate the process of OCR'ing, compressing, and optimizing litigation items

Find an OCR solution that could work silently in the background without staff intervention

Run OCR processing in NetDocuments for any newly profiled documents

Retire manual workflows and free up staff time to focus on the client experience

Use technology in a strategic and innovative way

About Shook, Hardy & Bacon L.L.P

Founded in 1889, Shook, Hardy & Bacon L.L.P. has 12 offices in the United States and London, with attorneys and professional staff serving clients in the health, science and technology sectors in areas ranging from product liability defense and commercial litigation to intellectual property prosecution and litigation, environmental and toxic tort, privacy and data security and regulatory counseling.

Meeting U.S. Court filing requirements more easily with automated OCR

Nearly all U.S. courts require electronically filed documents be in PDF format, text searchable, and below a certain file size. This can be a burden on staff if they must manually update documents for every piece of litigation.

Optical Character Recognition (OCR) software is used to convert image-based files into text-searchable PDFs. Many firms still manually OCR files by asking staff to upload them to a single location on a network drive, or to print and then scan them using an OCR-equipped multi-function device.

Luke Schnoebelen, Learning & Development Manager at Shook, Hardy & Bacon L.L.P (SHB), was asked if he could find a better way to OCR files than processing them manually. "I had a meeting with two attorneys in charge of major litigation with hundreds of filings," explained Luke. "They said their current OCR process was really clunky and manual. The litigation was time-sensitive, and they needed a better workflow. They asked, 'Do you know of any tools that can make what we're trying to do easier?'"

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After considering the process, Luke observed that "these attorneys were doing a good job, but they're not necessarily relying on technology to assist them."

Luke, Senior Systems Administrator **Andrew DuMay**, and Director of IT **Tim Soto** decided to do a real-time test of contentCrawler, an automated OCR and compression tool, based on the specific court requirements for filing litigation documents.

Running in a separate network location for this litigation project, "contentCrawler took PDFs that were massive in size, or not formatted correctly for filing with the courts, and processed them in almost real time," explained Luke.

This large litigation project involved hundreds of filings, "which, with the old process, normally took 40 minutes to OCR and compress. With contentCrawler it went down to 30 seconds." This was because contentCrawler compresses and OCRs files silently in the background 24/7 and without staff intervention.

"We found that we were able to save hundreds of hours immediately because people had been doing this OCR process in three steps," Luke continued. "The old workflow was a very manual, arduous one. Staff was OCR'ing, then compressing, then optimizing. But contentCrawler does this automatically – and all we have to do is move the files into the location for processing."

The court filing process, in general, was made more efficient with contentCrawler's automated OCR'ing, since staff can work on other tasks as files are being compressed and converted to text-searchable PDFs. "Since contentCrawler takes the previously time-consuming OCR work off their plates, our attorneys are now able to file more litigation items in less time," said Luke.

In terms of feedback, staff were glad to have extra hours in their day to get more done and put an even greater focus on the client experience.

"With contentCrawler, staff time has been freed up to focus on creating an even better relationship with our clients, and to show them the firm is efficient and innovative with our use of technology," Luke continued. "One senior analyst was excited because she couldn't even imagine having that time back to do QA work on the output for example. In the long run, contentCrawler will be incredibly valuable for any

team doing this kind of work." contentCrawler will be used at the firm to OCR documents added to its NetDocuments document management system, since contentCrawler integrates directly with NetDocuments. When contentCrawler runs in Active Monitoring mode, it intelligently analyzes and processes any newly profiled documents in NetDocuments for OCR'ing. At the same time, it can run in Backlog Mode to process legacy documents already in NetDocuments. If required, SHB has the option to point contentCrawler at only certain cabinets in NetDocuments.

Summary
Shook, Hardy & Bacon L.L.P is using contentCrawler to automate the time-consuming process of manually OCR'ing, compressing, and optimizing litigation items that will be filed electronically with the courts.

The firm used a major litigation project with hundreds of filings to determine what could be gained from contentCrawler's automated OCR processing framework. Immediately, the firm saw it could save hundreds of hours as time spent processing documents went from 40 minutes to 30 seconds.

As part of the team leading the project, Luke thinks "we're very early in the process of realizing the true benefits of contentCrawler. I'm positive there are other projects at SHB that will benefit from this solution. Ultimately, contentCrawler is part of the firm's approach to investing in technology strategically, but also in a way that is beneficial to our clients."

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