

3D Workflow

PerfectLaw has long been the leading publisher of All-in-One® legal software, and has now invented an entirely new paradigm for DOCKET DRIVEN DOCUMENTS called 3D Workflow. 3D combines docketing with Imaging, Document Assembly, and Reporting Writing to automatically schedule, create, profile and save all types of documents into PerfectLaw Document Management System in 1-Step process. Once saved, the same 1-Step workflow automatically routes the documents to recipients in pdf, tiff and other formats. 3D Workflow is the fastest, most highly automated document workflow system on the market today.

To illustrate, suppose a firm receives an order from the court or an office action from the patent office and the firm's docketing department runs the appropriate rule to track the document's receipt by mail and to docket the subsequent tasks and deadlines required to respond.

Edit Activity

File Edit Help

General Doc Link

Doc Link Type

- (NONE)
- Merge Form
- Report
- Image Coversheet

Email routing relationships

- Applicant atty
- Applicant

Merge Form

Report Name

Document Name: Original Documents

Document Type: CONT Contracts

Document Notes: Immigration forms from Applicant. |

OK Cancel

3D workflow docketing can then automatically print an imaging coversheet and routing slip because the Docketing System knows everything, such as how and where the hardcopy document should be saved and who should receive it by email.

The coversheet is then placed on top of the document received and run through any scanner or digital copier. The server-side PerfectLaw Imaging Program then reads the coversheet and saves the imaged doc as a .pdf or .tif to the PerfectLaw Document Management System (DMS) system and routes it by email to predefined parties and contacts. The entire process is done in one PerfectLaw step via running the docketing rule (this does not count the mail room clerk who runs the document through the digital copier or scanner).



EXECUTIVE DATA SYSTEMS, INC. PerfectLaw Imaging Cover File: IMG00V
Run: 1/22/2004 2:33:58 PM

Document Code: CS7260
Document Name: PerfectLaw Imaging Memo
Client: 000 Executive Data Systems, Inc.
Matter: 09004 Network Support
Date: 1/22/2004
Author: RCM Ramon Caudet

Notes: PerfectLaw Imaging Tools allow firms to automate the process of scanning, profiling, notifying and evaluating cost of scanned documents into the PerfectLaw system.

Email Notifications: TO: ADLER, MARC -> ma@perfectlaw.com
ARAGON, BARBARA M. -> ba@perfectlaw.com
BLUCHLINGER, RAJUL -> rb@perfectlaw.com
CAUDET, RAMON -> rramon@perfectlaw.com
DUNCAN, JOHN -> jd@perfectlaw.com
GAINES, JUSTIN -> jg@perfectlaw.com
WILLIAMS, CARL -> cwr@perfectlaw.com
CC: CAUDET 2, RAMON -> rramoncaudet@hotmail.com
DUNCAN, JOHN -> dduncan@yahoo.com

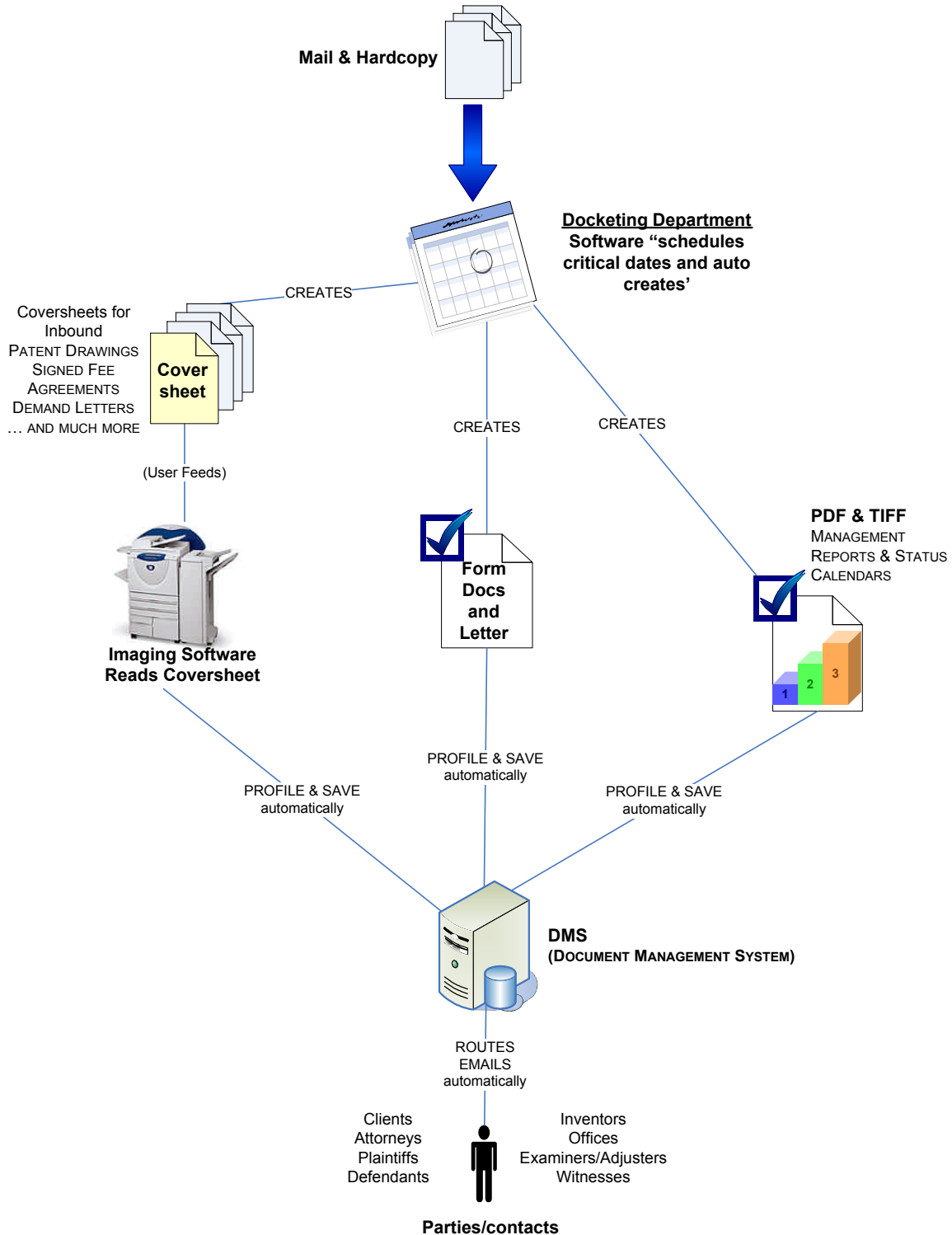
Instructions:
Attach this printout as cover page of your document.
Scan all the document pages with this one being the first scanned page.
Keep the set together when archiving hard copy.

3D can in fact "one-step image and route" all types of documents such as patent drawings, signed fee agreements, demand letters, etc. while saving them to PerfectLaw 's DMS because 3D workflow rules not only contain docketing rules but other business rules for document management and routing rules as well. Next suppose a PerfectLaw rule for opening a file was run by the billing department or a secretary. This rule might docket a task to send a thank-you letter to the client and/or a deadline to send a motion to dismiss or for summary judgment to the court and apposing counsel.

To do everything in one-step, the user simply Right-clicks the task or deadline in the matter or attorney calendar screen and selects CREATE, SAVE & ROUTE. 3D workflow does the rest because it can then automatically assemble, save and route the letter or motion since, PerfectLaw docketing and business rules define everything regarding the document processing, i.e. the What, How and Where for the assembled document. The entire process was done in one PerfectLaw step via selecting the CREATE, SAVE & ROUTE associated with the docketed task or deadline (not including physically mailing a printed document).

Finally, suppose a PerfectLaw rule created a docketed task or deadline to run and route a conflict or status report that appears in a PerfectLaw matter or user calendar screen. Again, all the user does is Right-click the task or deadline in the calendar or task list screen and chooses CREATE, SAVE & ROUTE.

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3D workflow does the rest because it can then run, save and route the PerfectLaw report since the PerfectLaw docketing and business rule defines everything regarding report processing, i.e. the What, How and Where for the report in question. The entire process was done in one PerfectLaw step via selecting the CREATE, SAVE & ROUTE associated with the docketed task or deadline.

3D workflow also automatically creates time-slips and soft cost expense records when docketed events for document production, handling, and routing are designated as completed in any docket-driven matter or attorney PerfectLaw calendar.

3D synergy not only reduces the number of workflow steps needed to prosecute a matter successfully by as much as 70%, but promotes the paperless office and better time and cost accounting as well.

This extremely high degree of automation is possible with PerfectLaw , because the docketing and business rules are part of firm's database and because PerfectLaw All-in-One software can assemble or image documents and run reports dynamically and automatically.