

# *Going Paperless: How to Do It and What You Will Gain*

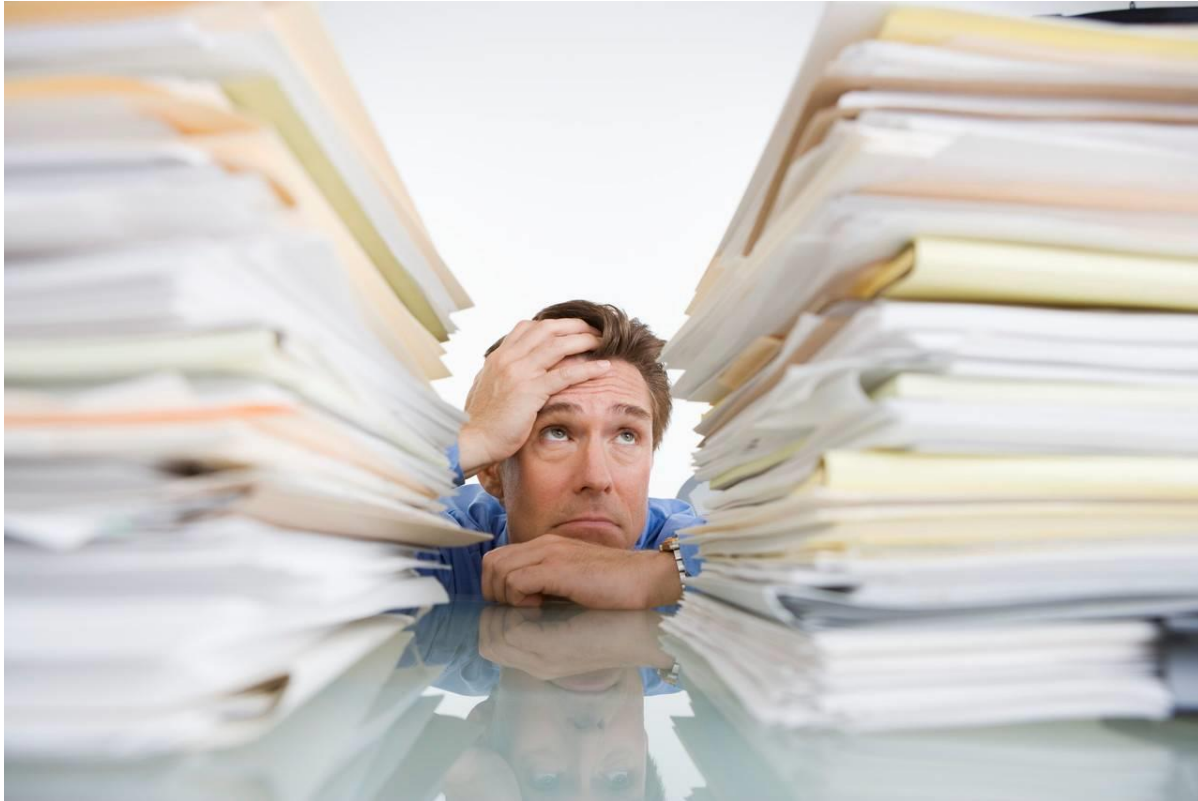
- *DeeDee Kato – VP of Corporate Marketing, Foxit Software*
- *Stanley Chow – Sr. Product Marketing Manager, Foxit Software*





- **How to Build The Business Case**
- **Challenges with digital content, protecting sensitive information, searching through scanned image files, paper-based signatures, etc.**
- **What capabilities to look for in a solution**

# ***What does your Law office look like?***



# ***Building the Business Case to Improve Operational Efficiencies***

## **Paper-based Costs**

- According to the Minnesota Office of Environmental Assistance, the typical office consumes about 10,000 sheets of paper per worker every year.
- Let's assume an organization manages 4,677,500 pages
- Estimating each document on average is 5 pages, this equals 935,500 documents
- The total cost to manage paper documents: **\$30,715,518 / Year**

The following pages breaks down the total costs.....



# Labor Costs



## File and Search for a document

- In a 2013 AIIIM business survey, the biggest issues caused by paper-based processes included re-keying data as well as constant re-filing, storing and searching for paper records.
- According to a [report](#) from PricewaterhouseCoopers, the average organization spends about \$20 in labor to file each paper document
- For 935,500 documents, the total cost is \$18,710,000

## Search for misfiled document

- PwC also estimated \$120 labor costs to search for a misfiled document
- Estimating 2% are misfiled ( $18,710 \times \$120 = \$3.9M$ )

## Recreate a lost document

- According to PwC, it costs approximately \$250 to recreate a lost document
- Estimating 2% are lost ( $18,710 \times \$250 = \$4.7M$ )

# Storage and Printing Costs

## Storing and Maintaining Records

- A four-drawer cabinet takes up 9 square feet of office space which is estimated to cost \$45 per month to maintain (e.g. SF office space is \$5 per sq. ft / month).
- Maintaining 100 four-drawer file cabinets will spend \$54,000 per year to store and maintain those files

## Printing Costs

- The average cost of toner, ink, and paper amounts to 3 cents per page.
- Printing 4,677,500 pages costs \$140,325.



# Reviews and Approvals



## Standard Mail

- US mail costs 83¢ per envelope
- Estimating 5% of the documents are routed by US mail ( $46,775 \times 83¢ = \$39K$ )

## Overnight Couriering

- An estimated cost of \$42.55 based on FedEx Standard Overnight for a package weighing .10 lbs
- Estimating 5% of the documents are sent via Overnight Shipment ( $46,775 \times \$42.55 = \$2M$ )

## 2<sup>nd</sup> Day Shipping

- USPS Express Mail flat rate fee is \$26.11 per package
- Estimating 5% of the documents are routed by US mail ( $46,775 \times \$26.11 = \$1.2M$ )

## Scanning for Archival

- Signed documents need to be archived either digitally or in paper form
- Estimating 50% of them are archived digitally (23,387 documents)
- Takes 3 mins to scan and save each document or 20 documents per hour
- The numbers of hours per year (1,169) x hourly rate of \$10 = \$11,693

## Fires, natural disasters

U.S. MARCH 3, 2015 / 3:48 PM / 3 YEARS AGO

### NYC warehouse fire destroyed files from 1 million court cases

An example of extreme loss comes from a fire in Brooklyn, NY in March 2015. The New York State Office of Court Administration lost **85,387** boxes of records from courts in all five boroughs to this fire. While some newer documents were filed electronically, officials expect to have little to back up of records filed before 1990. Officials stated that if any files are needed, they will have to try to **recreate them by hand** from related paper files stored elsewhere.

## Risks





# ***Soft Costs***

- **Less organized**
- **Less efficient searching for documents**
- **Cannot access documents remotely**



**ROI Calculator Spreadsheet Available Upon Request**

# ***Paperless Law Firm - How To Do It***



1. Ingest - Getting data into the system
  - Standardizing file formats, make text searchable, compressing files, convert emails to PDF, PDF/A
2. Keep files organized with a DMS
3. Preparing documents for counsel or courts
  - Bates numbering, portfolios
  - Protect and remove sensitive data
  - Create forms to gather client info
4. Eliminate paper-based signatures
5. Document security and collaboration
  - Shared reviews
  - Prevent unauthorized changes/users
  - Tracking

# ***1. Ingest - Getting data into the system***

# ***File type considerations***

- Bloated file sizes
- Unsearchable text and images
- Different file types
- Long term access
- Difficult to email
- Increasing file storage, especially when you are doing color scanning
- Manual processes



# ***Solutions to turn scanned legal documents into text searchable files***



# Fax/Scanners

## Ultra-high Volume, Production Grade Scanners



## Personal Scanners



## Electronic Fax

# Multi-Function Printers

- Basic MFPs
- MFP Advanced Compression / OCR

Panasonic  
**Foxit**

PremierOCR  
PremierCOMPRESSION

Making Files  
**SMALLER, FASTER AND  
EASIER TO PROCESS**

KM World  
**Trend-Setting**  
PRODUCTS OF 2017

Panasonic colour scanner range by category		A4 SCANNERS	A3 SCANNERS
WORKGROUP	<p>KV-S1026C KV-S1015C KV-S1057C KV-S1027C KV-S1065C KV-S1046C</p>		
DEPARTMENTAL	<p>KV-S2087</p>	<p>KV-S5055C KV-S5046H</p>	
LOW-VOLUME		<p>KV-S7097 KV-S7077 KV-S4065CW KV-S5076H</p>	
MID-VOLUME		<p>KV-S8127 KV-S4085CW</p>	
HIGH-VOLUME		<p>KV-S8147</p>	<p>Optional A4 flatbed scanner KV-SS081</p>

# Server-based Capture/OCR Software

**iManage Work**  
OCR Module

**Making image documents searchable**

**MANAGE ALL CLIENT WORK PRODUCT IN SINGLE UNIFIED ELECTRONIC MATTER FILES BY CLIENT AND ENGAGEMENT**

Documents

Email Cloud

Scanning Mobile

Collaboration Govern

Secure

The diagram illustrates a central document icon surrounded by various engagement and capture methods: Email, Cloud, Scanning, Mobile, Collaboration, Govern, and Secure. A central orange box represents the unified electronic matter files.

# Advanced compression capabilities

**Foxit**

**PDF Optimization Suite for OpenText Captiva**

opentext™

.zip .doc HTML @

.PDF xyz

**Optimizing Documents**

CVISION's PDF Optimization Suite enables:

- Efficient OCR handling for scanned image documents and digitally born files.
- Anywhere/anytime content with industry-leading file compression.
- Microsoft Office to PDF conversion, and much more!

The advertisement features a blue background with a circular arrow icon and icons for various file formats (.zip, .doc, HTML, @) and a search interface for PDF files.

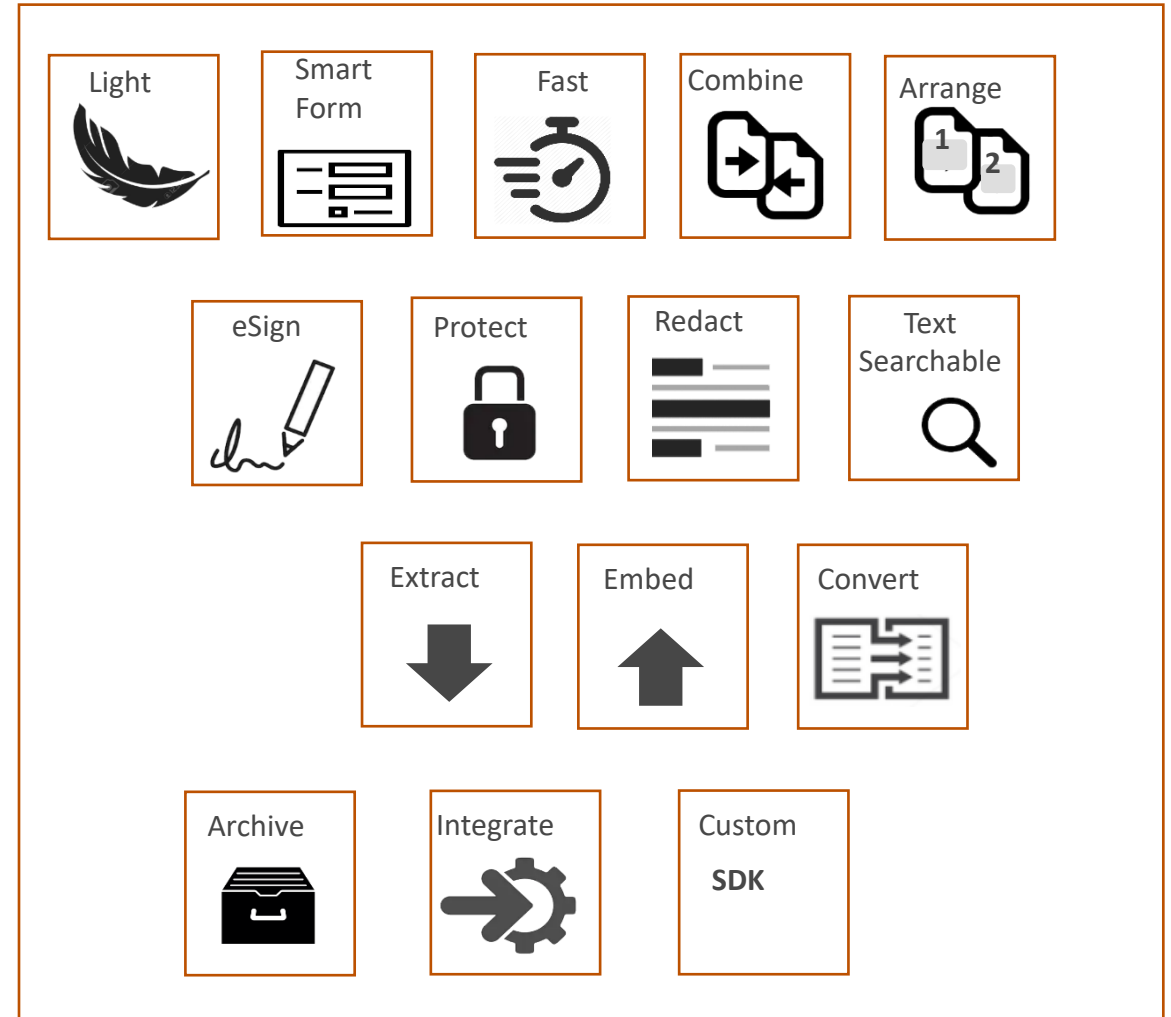


# How Does Large Scale Automation Work?



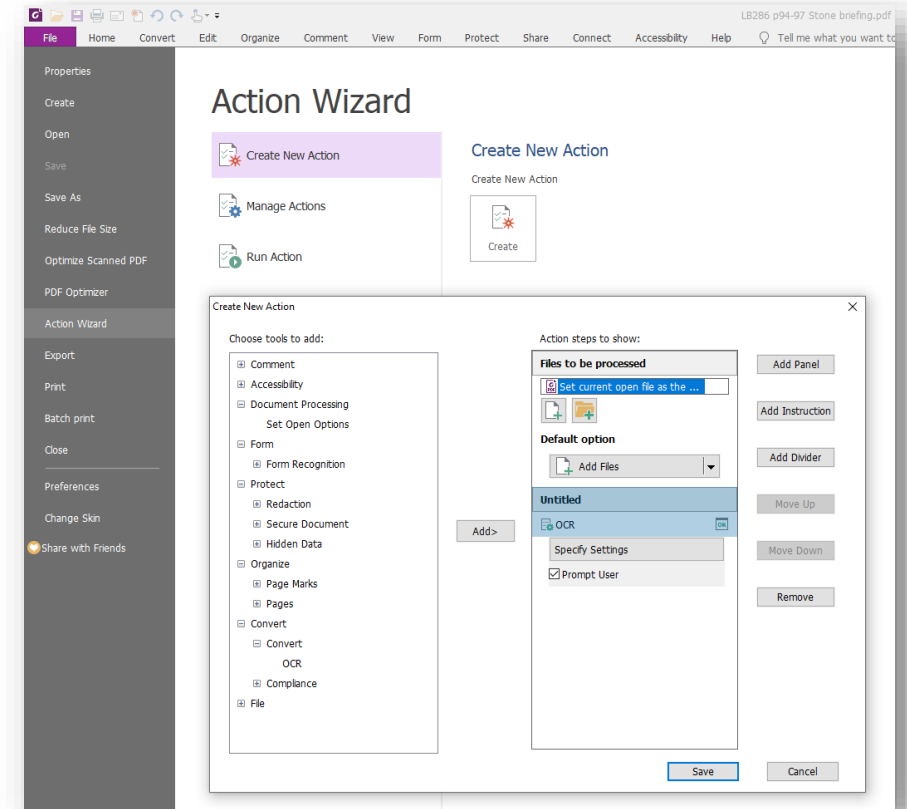
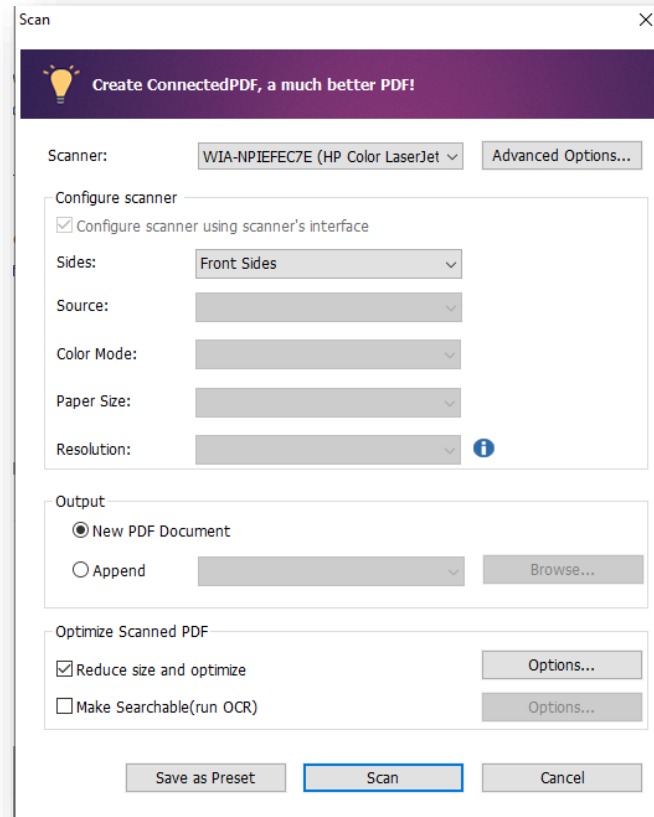
- Convert and Compress Documents
  - Reduce Size by 50% or More
  - Transfer/Open 50% Faster
- Conversion Strips Out Viruses and Ensures Files Can Be Opened 100 Years From Now
- Normalize Born Digital and Image Files to Searchable PDF
- Shrink Mass Files for Emails

Rendition Server  
 PDF Compressor  
 Maestro Server OCR



# Individual Document Scan and OCR with Desktop Software

- Acrobat, PhantomPDF and Foxit Reader
- Action Wizard can process batches of documents



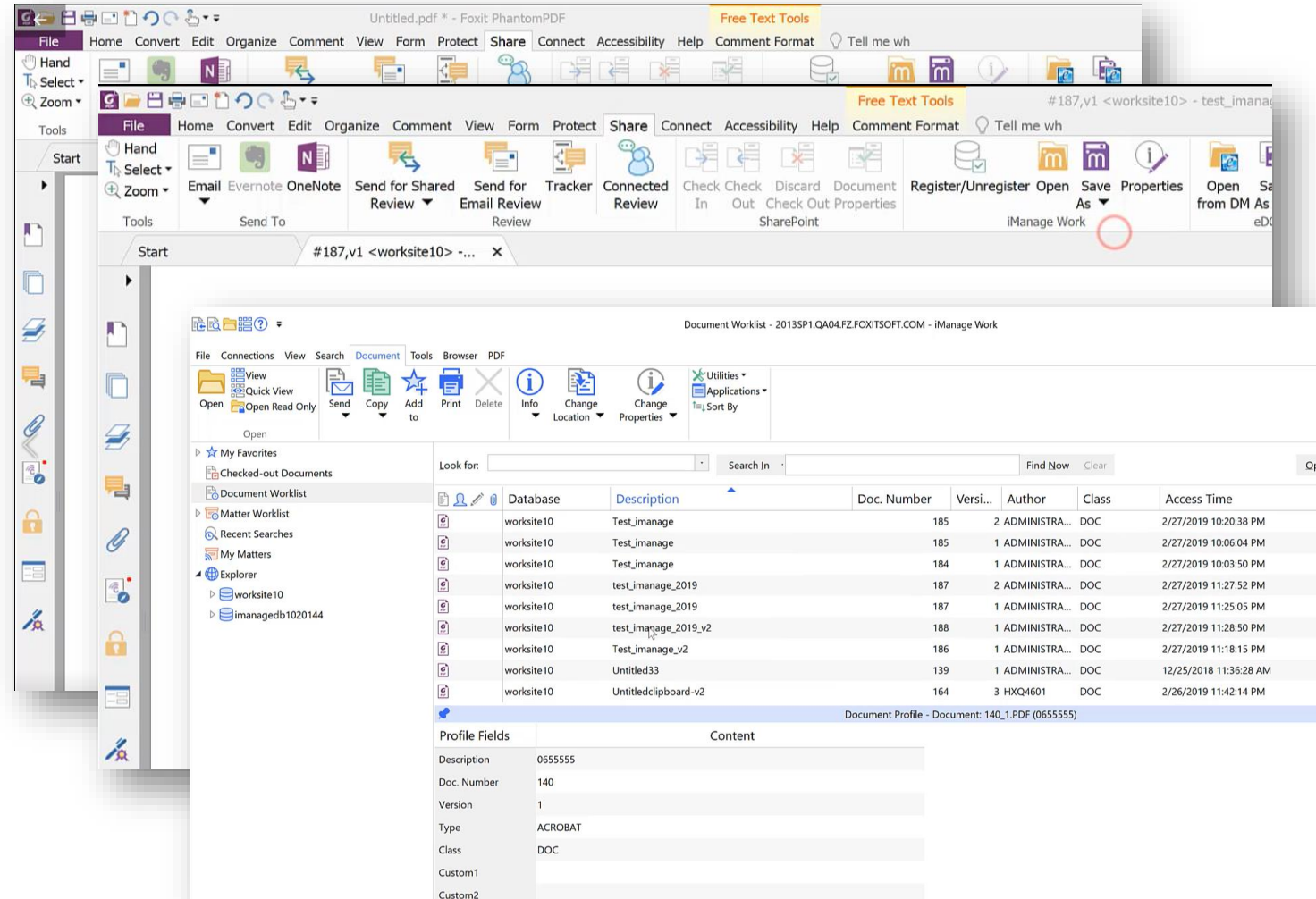
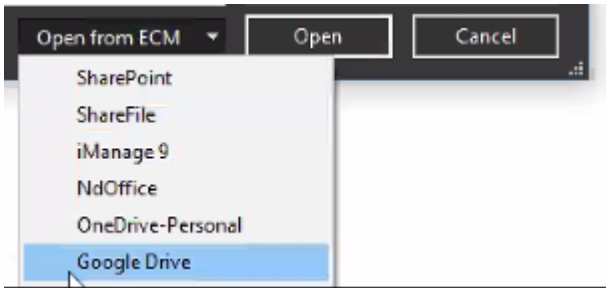
## ***2. Keep files organized with a DMS***

# DMS Integration

**Challenge:** Scattered electronic matter files

**Solution:**

- Open, Check-In, Check-Out from PhantomPDF
- Convert files to PDF in batch from iManage
- Add bates numbering to files from SharePoint, ShareFile, iManage 9, ndOffice, OneDrive-Personal, Google Drive, Box, Dropbox, eDOCS DM, and DMSforLegal.



# Customers Using Foxit DMS Integrations

- iManage

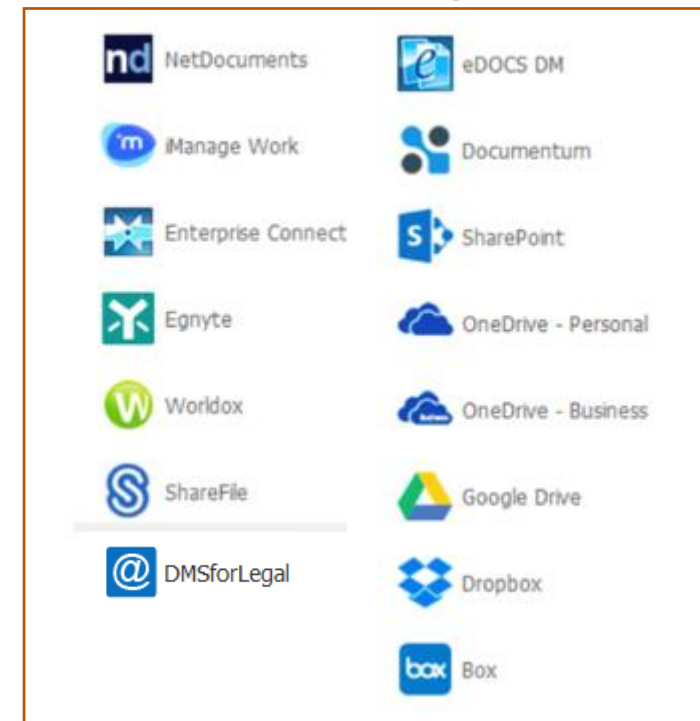
- Baker and McKenzie
- RSM International
- Meredith McConnell
- Brown Rudnick
- Norton Rose Fullbright
- Scroggins Grear
- Aldridge Pite
- 3M

- NetDocuments

- McLennan Ross
- Frith Anderson Peake
- Lavan

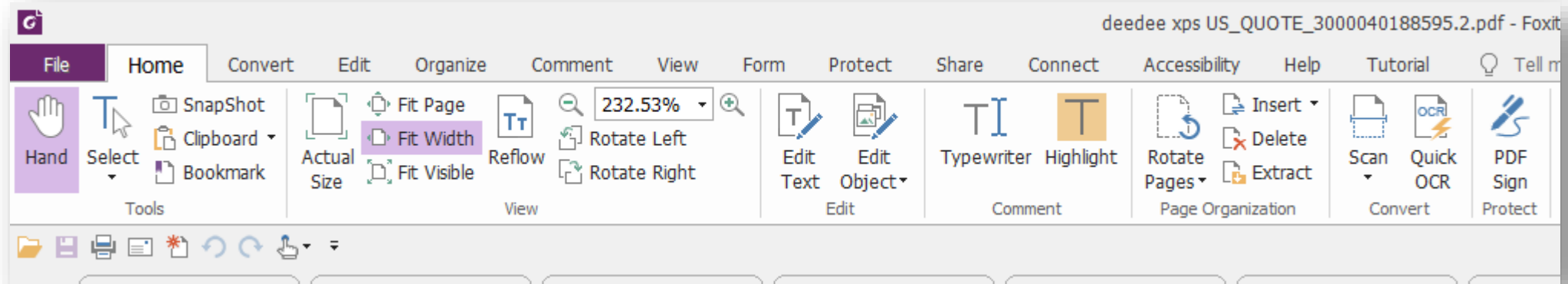


## Other DMS Integrations



### ***3. Preparing documents for counsel or courts***

# PDF Editing

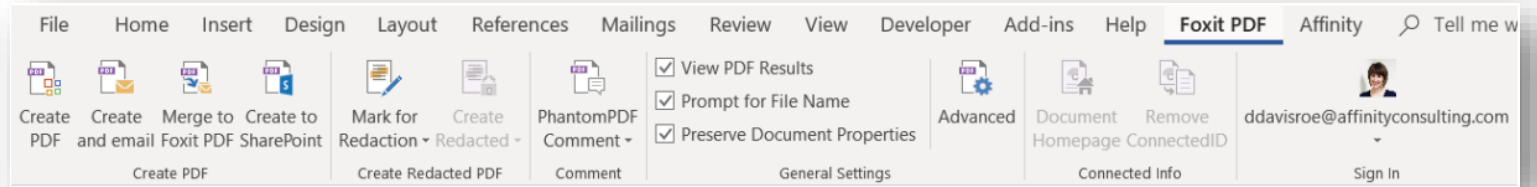
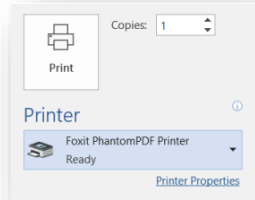


- Create Accessible PDF Documents
- Edit Content and Layout
- Drag & Drop Pages Between Files
- Export to Office and Other File Formats
- Convert Paper to Digital
- Easy to Use Form Design Tools

# Integration with Microsoft



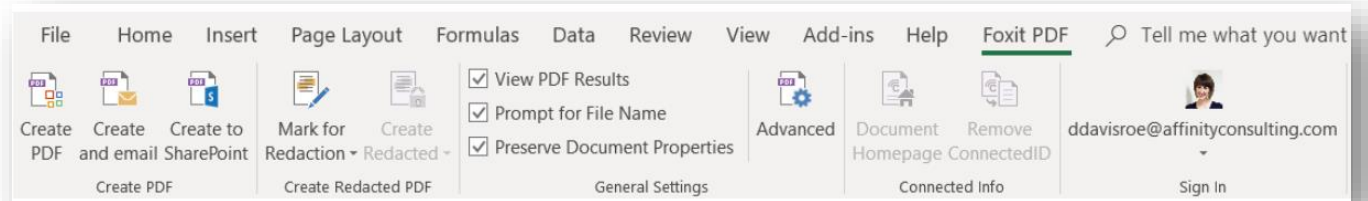
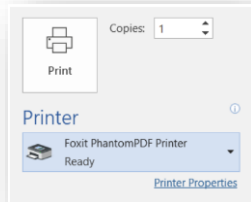
Word



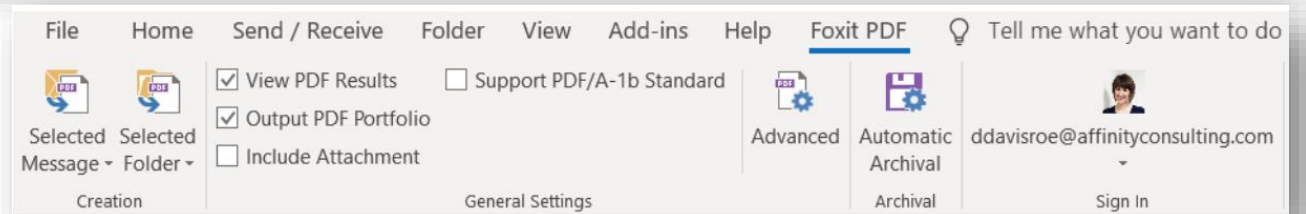
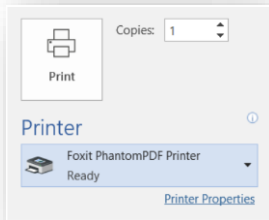
Excel



Powerpoint



Outlook



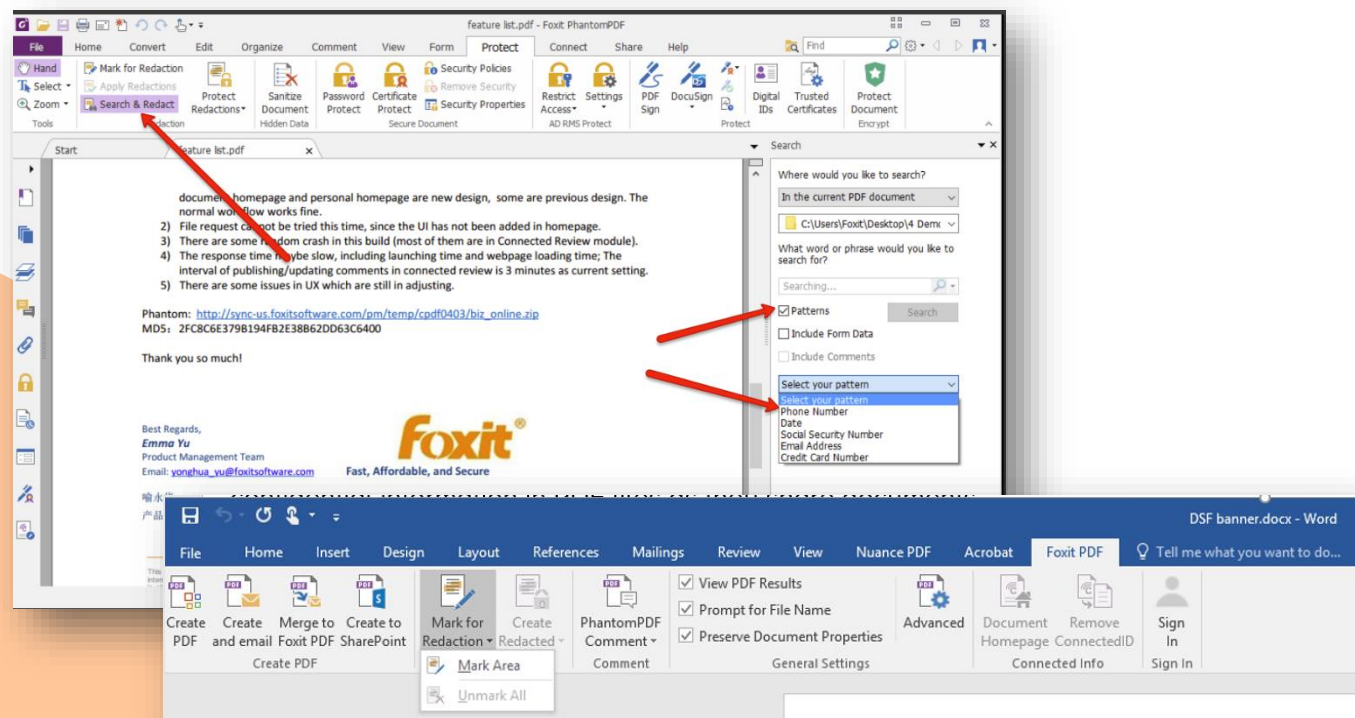
File Explorer





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    - a. Background ..... 175
    - b. Charging Decision As to **Harm to Ongoing Matter** ..... 176
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# Redaction



# Remove Hidden Content

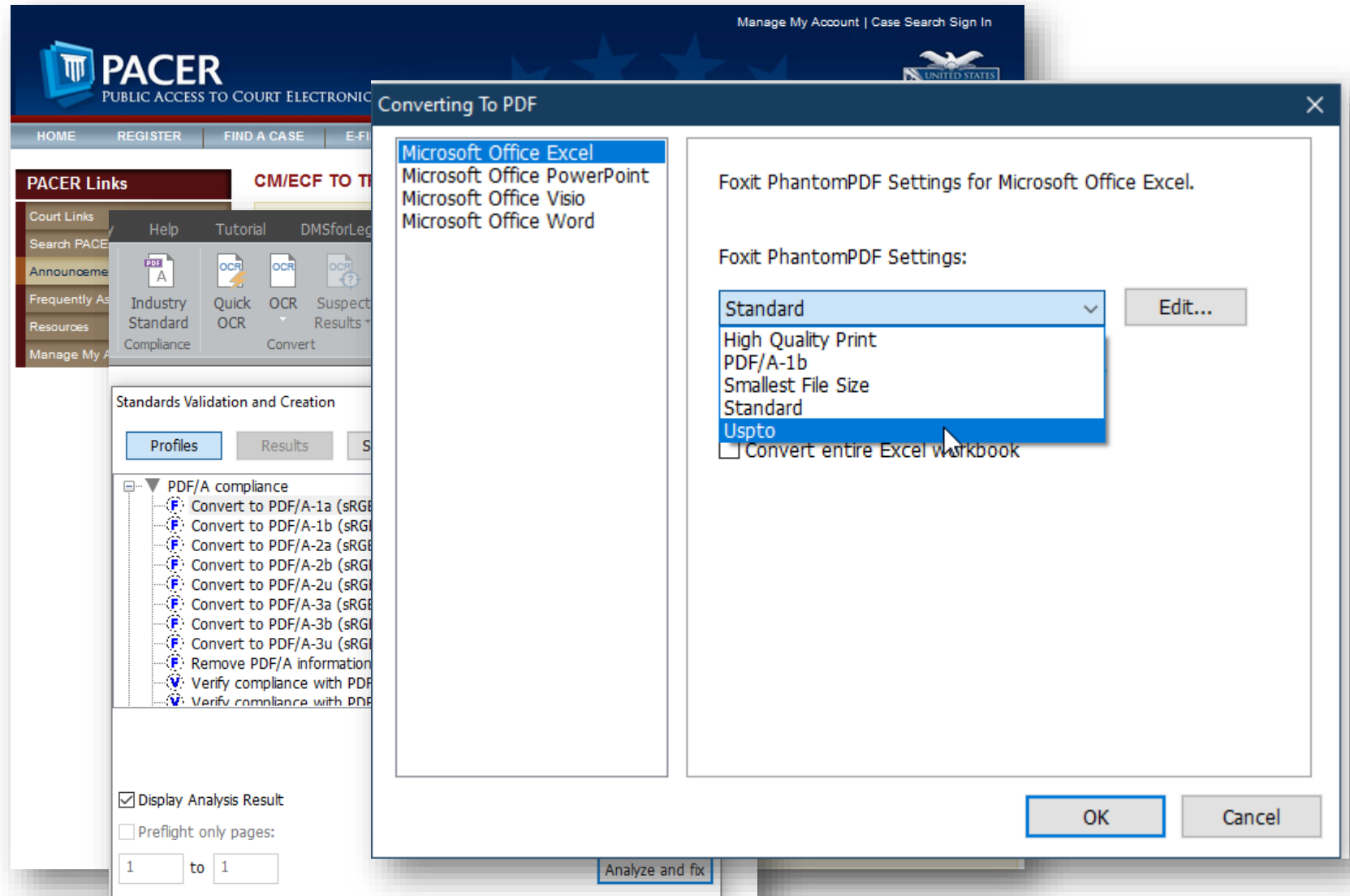
The screenshot displays the Foxit PhantomPDF application interface. The 'Protect' tab is active in the ribbon, and the 'Sanitize Document' button is highlighted. A tooltip for 'Sanitize Document' is visible, stating: "Remove potentially sensitive information from this document, including comments, metadata, links, and form fields." Below the ribbon, a document titled '2019 Media Kit' is open. A 'Remove Hidden Information' dialog box is open in the foreground, listing the following items to be removed:

- Metadata
- File attachments
- Bookmarks
- Embedded search index
- Comments and markups
- Form fields
- Hidden text
- Hidden layers
- Deleted or cropped content
- Links, actions and Javascripts
- Overlapping Objects

The dialog box includes 'OK' and 'Cancel' buttons at the bottom right.

# Court Rule Compliance

- **Public Access to Court Electronic Records (PACER)**
- **States with PDF/A legislation:**
  - California
  - Massachusetts
  - New York
  - Nevada
- **The National Archive and Records Administration (NARA)**
- **Administrative Office of the U.S Courts**
- **National Library of Congress**
- **Federal Judiciary's Case Management/Electronic Case Files (CM/ECF)**
- **Create USPTO-compliant PDFs**



## ***4. Eliminate paper-based signatures***

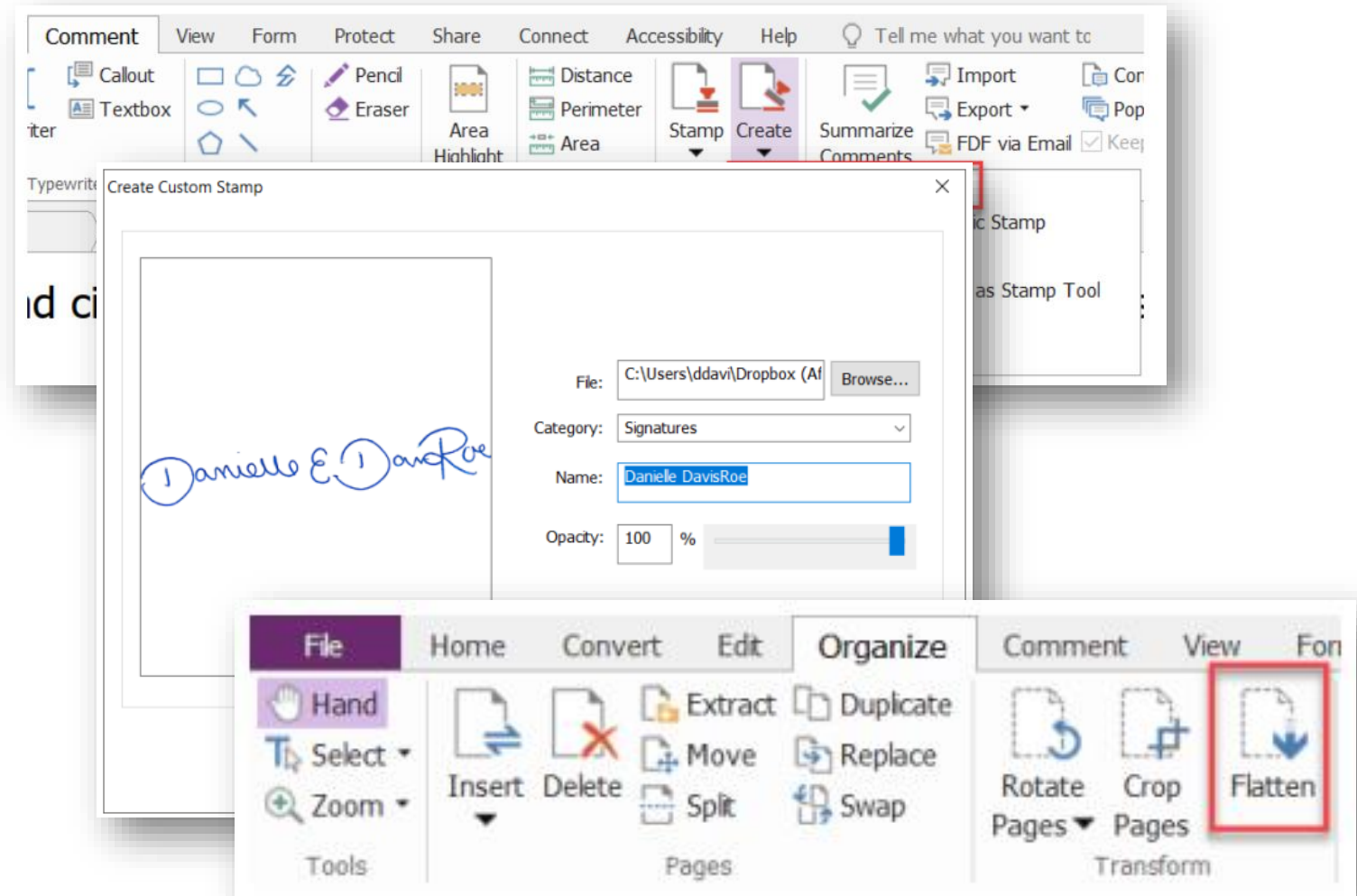
# 1) Signature Image Stamp

# 2) PDF Sign

# 3) Digital Signatures

Create your own or obtain a digital ID from a trusted 3<sup>rd</sup> party provider (Certificate Authority (CA)) for authentication

# 4) eSignatures



1) Signature Image Stamp

2) PDF Sign

3) Digital Signatures

Create your own or obtain a digital ID from a trusted 3<sup>rd</sup> party provider (Certificate Authority (CA)) for authentication

4) eSignatures

The image shows a Foxit Reader interface with a PDF document open. The document contains a signature image stamp and a HIPAA Privacy Rights Request Form. The signature image stamp is a blue box containing a handwritten signature and the text "Phil Lee I am approving this document". The HIPAA form includes fields for patient information, type of request, and a section for staff members contacted. A green "SIGN HERE" button is visible at the bottom right of the form.

**HealthOne**  
110 J. Iain Street  
Yourtown, USA

**APPROVED**  
Phil Lee, 11-06-03, 16/03/2017

[Contact information for Privacy Official]

**Foxit**

**HIPAA Privacy Rights Request Form**  
PATIENT INFORMATION

Date \_\_\_\_\_  
Name (Last, first, middle initial) \_\_\_\_\_ Social Security # or Patient ID \_\_\_\_\_  
Street address, City, ST, ZIP Code \_\_\_\_\_  
Primary phone number | Other phone number \_\_\_\_\_ Email address \_\_\_\_\_

**Type of Request**

Access/copy  Amendment  Restriction  
 Confidential communication  Accounting of disclosures  Complaint

Please describe nature of action requested (type of information requested; nature of amendment, restriction, alternative communication, or complaint, etc.) in detail.  
[Note: If this is an alternative communications request, please list alternative location/address for receiving medical information below.]

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Please list [Company Name] staff members that were contacted regarding this matter:

Name	Date
_____	_____
_____	_____

Signature \_\_\_\_\_ Phil Lee  
Date \_\_\_\_\_  
I am approving this document  
Date 2017-03-16 11:07:23

**For Administrative Use Only:**

Action taken	Date received
_____	_____
_____	_____

Privacy Official signature \_\_\_\_\_ Date \_\_\_\_\_  
Attach additional documentation, if applicable.

**SIGN HERE**

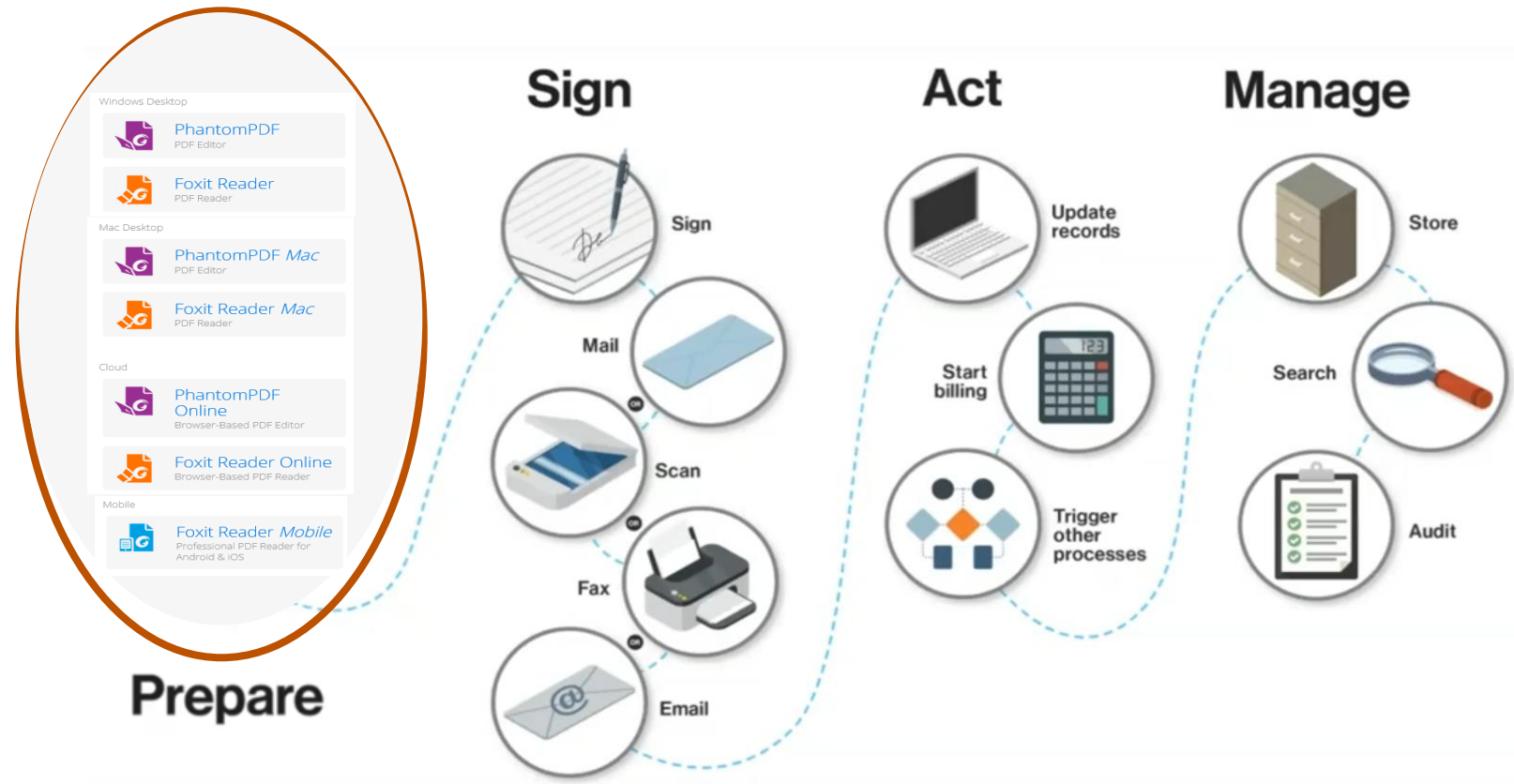
1) Signature Image Stamp

2) PDF Sign

3) Digital Signatures

Create your own or obtain a digital ID from a trusted 3rd party provider (Certificate Authority (CA)) for authentication

4) eSignatures with **DocuSign®**



# 1. *Demo*



**ANDREWS THOMPSON**  
ATTORNEYS AT LAW

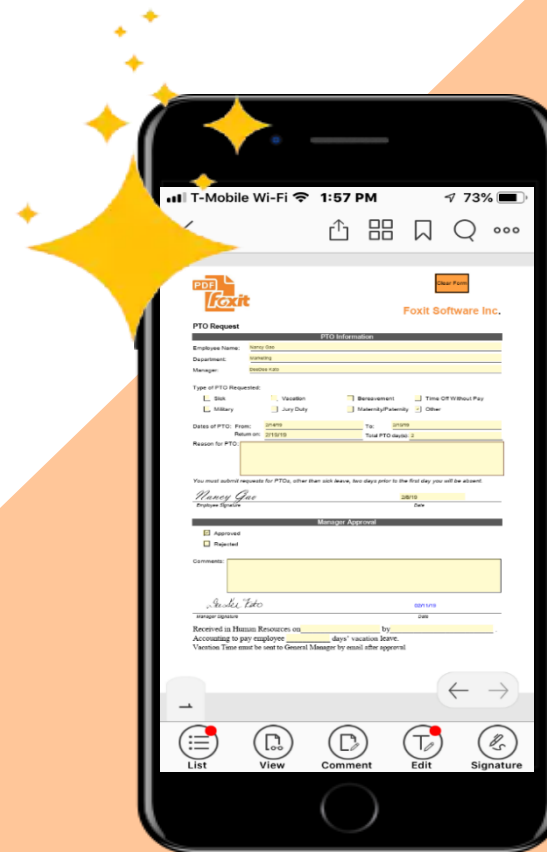
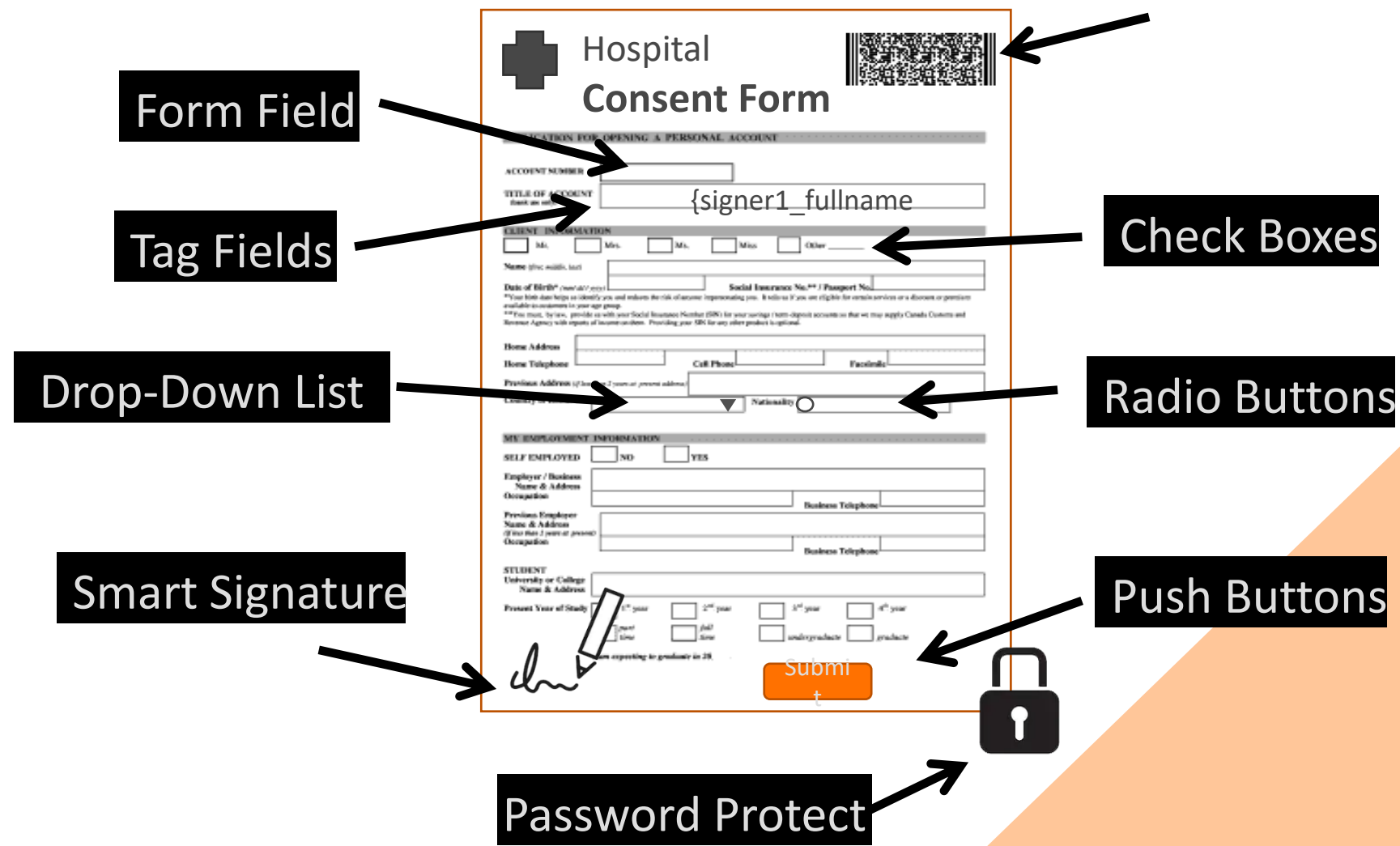
- **Stanley Chow** – AT Law Associate
- **Tim Andrews** – Managing Partner
- **Sally Johnson** – Client

**Scenario #1: Create and Sign Retainer Agreement**

**Scenario #2: Create and Sign Client Intake Form**



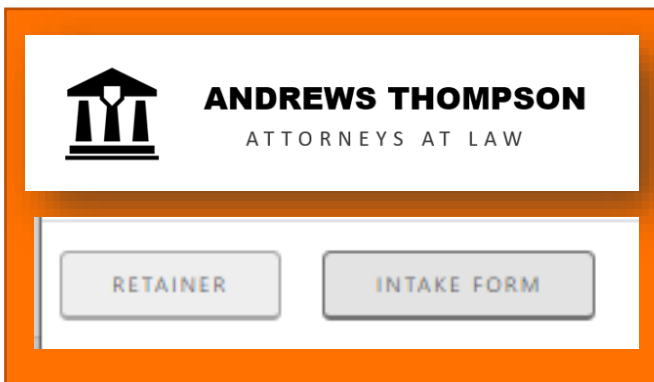
# Prepare - Create, Collaborate, Redline, Redact



# Customized PDF Online Form

- 1) Foxit WebPDF SDK for Web provides PDF viewing and data capture through web browsers
- 2) No additional software required
- 3) Reuse fillable PDF forms to capture data and submit into your backend system (WIP)

e.g. <http://www.andrewsthompsonlaw.com>

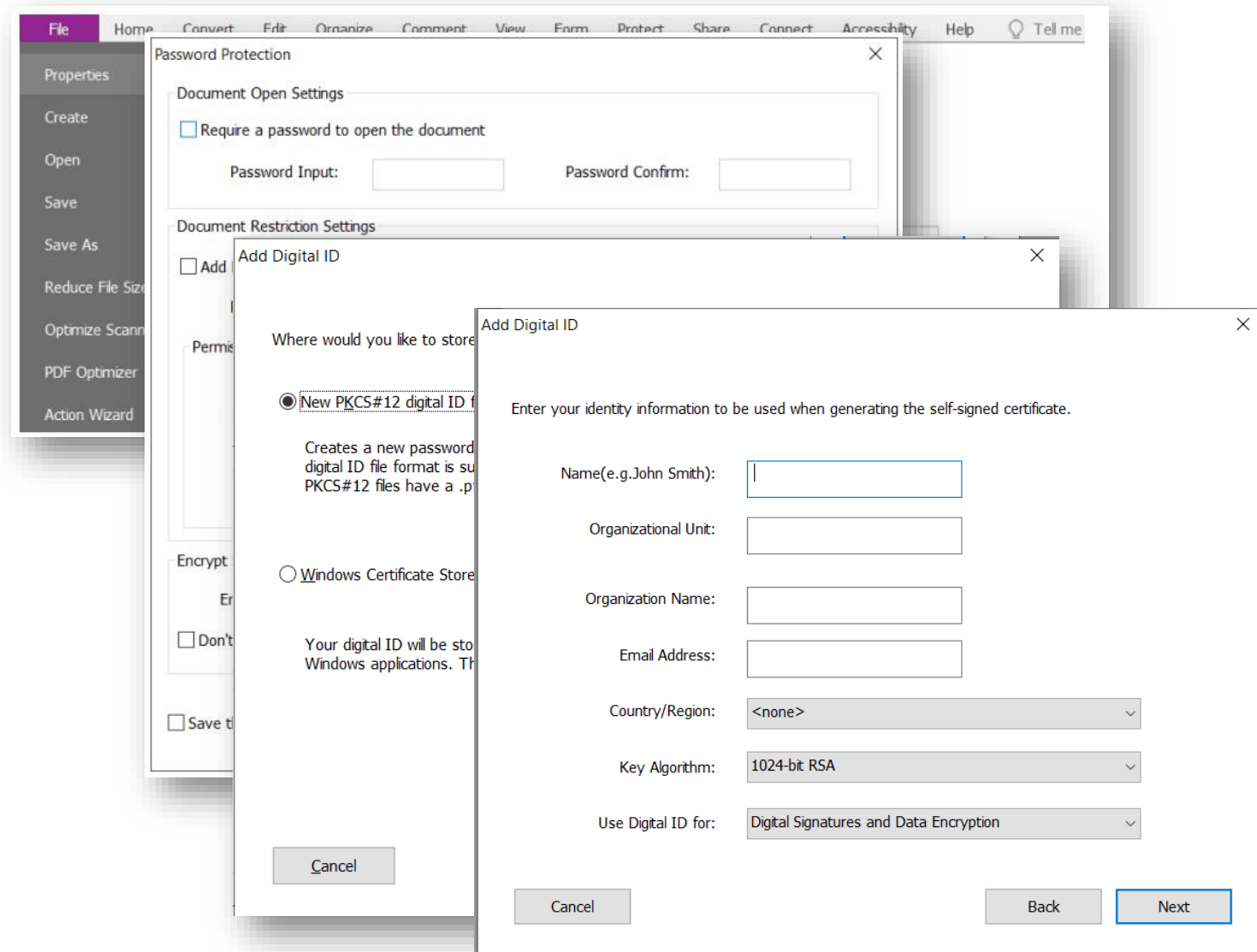


The screenshot shows a web browser displaying a customized PDF form titled "SOCIAL SECURITY INTAKE SHEET" from Andrews Thompson Attorneys at Law. The form is filled with data, including:

- INTERVIEWING ATTY: 13
- DATE: 04/02/2020
- CONFLICT CP: 12 INI: 234
- CONFLICT BXL: 23 INI: 2453
- Name: Victoria Demo R. (Last Name, First, Middle, Maiden)
- DOB: 09/08/1969
- Sex: M  F
- Place of birth: Fremont, Alameda, CA, US (City, County, State, Country)
- Social Security Number: 123456789
- Driver's License Number: Y12334566
- State: CA
- Address: 1788 Ward Road, Apt. # 211
- City: Fremont, County: Alameda, State: CA, Zip: 94555
- Home Phone: (650) 1234567, Work Phone: ( )
- E-Mail Address: Victoria@gmail.com, Cell Phone: ( )
- I authorize emails concerning my case.
- I authorize emails of general interest from Andrews Thompson.
- I authorize a follow up call regarding my consultation. If yes, please list a contact number. ( )
- Marital Status: Non, Spouse's Name: ( )
- What date did you apply for disability benefits? 03/03/2013, What date did you become disabled? 03/04/2013
- What date did you last work? 03/12/2013, What was your job? Consultant
- What dates were you denied benefits? (Enter all dates if multiple applications or multiple denials on same application) 04/11/2013
- Do you know what level of appeal your case is on? Level II
- Did you apply for both DIB and SSI or only one? DIB Only
- Highest grade completed in school? College, any vocational training? No
- What type of work have you done for the last 15 years? Consultant
- Did you receive any worker's compensation benefits associated with your disability? no

## ***5. Document security and collaboration***

- 1) Password Protection and Certificate Protection
- 2) Microsoft Active Directory/Azure Rights Management Services integration DRM
  - provides protection to PDF documents in SharePoint, Exchange, and or desktop solutions
- 3) Connected PDF
- 4) Windows Information Protection (WIP)
- 5) FIPS mode



# 1) Password Protection and Certificate Protection

# 2) Microsoft Active Directory/Azure Rights Management Services DRM

# 3) ConnectedPDF - Security token (DRM) embedded in document:

- Track document
- Grant and revoke access
- Share documents securely without complicated trust mechanism

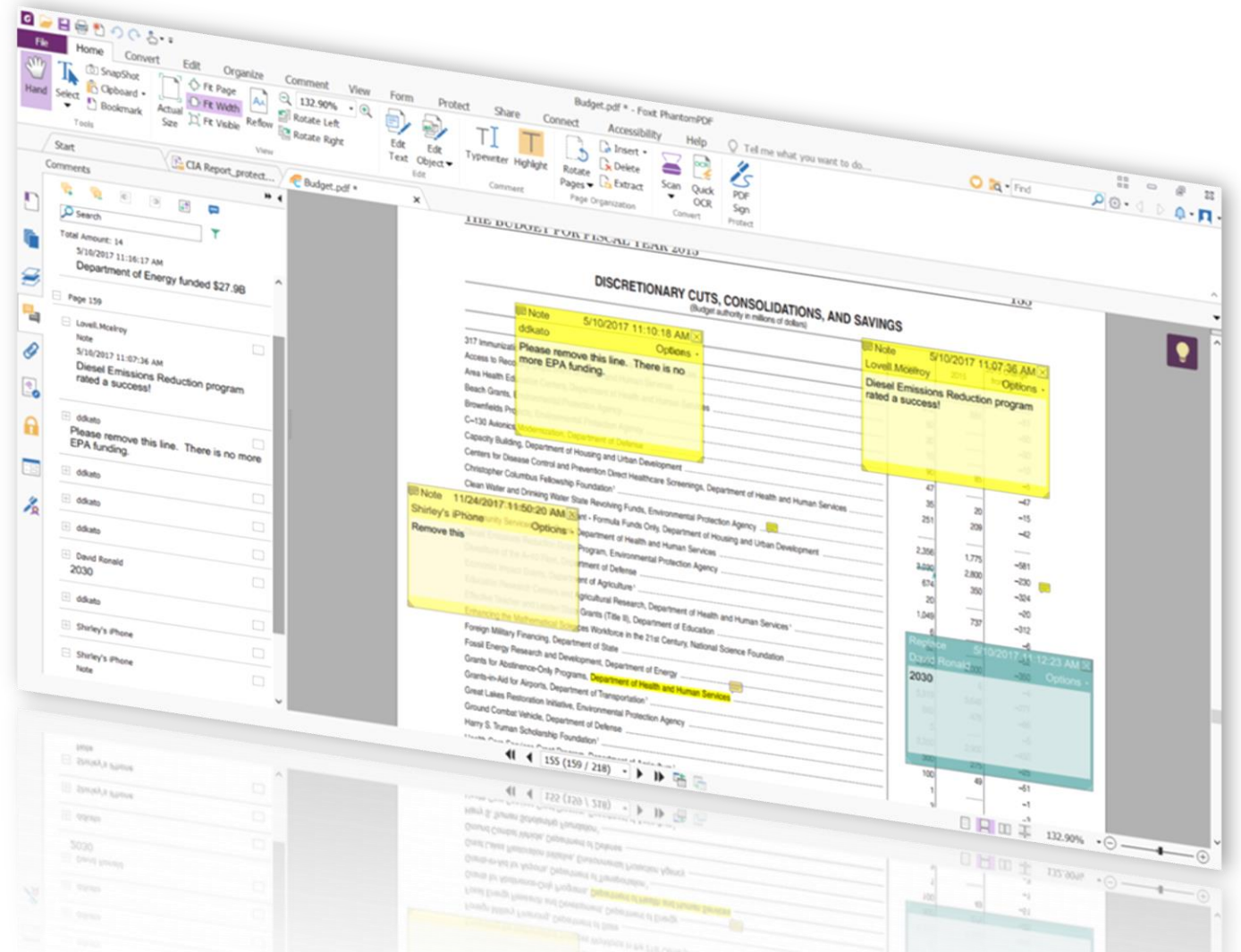
# 4) Windows Information Protection (WIP)

# 5) FIPS mode



# Real-Time Collaboration and Co-Authoring PDFs

- Easy setup for internal and external users
- Share content quickly and easily, regardless of where the document lives (on-premise DMS/EMS, cloud storage, files on mobile devices, etc.)



# *How Foxit Can Help*

# One Platform for ALL Your PDF Needs



## End-User Productivity

Desktop software, mobileapps,  
and cloud services



## Enterprise Automation

Server software for large scale  
PDF document management



## Developer Solutions

Incorporate powerful PDF  
technology into applications



# ILTA PDF Shoot-Out

## Part 1 – Takeaways

<https://www.iltanet.org/blogs/seth-silapasvang/2019/04/08/pdf-shootout-takeaways?ssopc=1>

GET INVOLVED - LIVE EVENTS - RESOURCES -

**PDF Shootout**

When: Mar 28, 2019 from 3:00 PM to 4:00 PM (ET)

**Description**

PDF, schme-DF...We all use PDF viewers almost every day, but when we need to edit PDF's which one is the best? Come join our virtual roundtable. The panel will discuss the differences between some of the most popular PDF editors on the market and how they perform in the swimming pool of legal applications.

**Panel**

**Rex Balboa** - Systems Business Analyst, Perkins Coie LLP  
**Aaron D. Barbee** - Training & Development Specialist, Husch Blackwell  
**Dave Deopersaud** - Technology Learning Specialist, Osler, Hoskin & Harcourt LLP  
**Holt Satterfield** - Director, Information Technology, McCourt Global  
**Kevin Svec** - MIS Director, Sanders and Parks PC

#Virtual  
 #DesktopandApplicationServices

## Part 2 – Deep Dive

<https://www.iltanet.org/viewdocument/foxit-pdf-highlights?ssopc=1>

GET INVOLVED - LIVE EVENTS - RESOURCES - ABOUT ILTA -

**Recordings**

Back to Library

**Foxit PDF Highlights** Follow ☆ Like ♥

an hour ago Statistics

0 Favored  
 3 Views  
 3 Files  
 0 Shares  
 2 Downloads  
 Actions -

**Speakers:**  
 @DeeDee Kato - Senior Director of Marketing at Foxit Software  
 @Holt Satterfield - Director, Information Technology at McCourt Global

**EVALUATE THIS EVENT**

#Webinar  
 #technologysupportservices

**Holt Satterfield**  
 Director, Information Technology at McCourt Global

**DeeDee Kato**  
 Senior Director of Marketing at Foxit Software

# Cleary Gottlieb Steen & Hamilton LLP

**Gottlieb is a preeminent global law firm, with offices on four continents and an unparalleled reputation for groundbreaking work.**

## 2019 Vault Rankings

#14 Vault Law 100

#1 Best Law Firms for Antitrust

#3 Best Law Firms for International Practice



## Challenges

- High inflow of large documents ranging from hundreds to thousands of pages long
- Difficulty retrieving documents relevant to cases
- Attachments to emails would bounce back because of file size

## PDF Compressor provided

- Electronic documents with reduced file size
- Remote document retrieval
- Integration with OpenText Captiva for a complete ECM, capture, OCR, conversion solution

# ***Meredith Connell***

**New Zealand's largest litigation firm providing clients advice and representation across more than 21 practice areas.**

## **Challenges**

- Acrobat DC didn't integrate well with Citrix digital workspace
- High cost of Acrobat equipped only a subset of people

## **PhantomPDF provided**

- Days of work time saved
- Stellar customer support

“With Foxit, we can sequentially number documents using Bates numbering within subfolders,” Birch said. “We couldn't do that in Acrobat, and it arguably saves us two days of work per bundle



# ***Hargraves McConnell & Costigan***

**Hargraves Connell & Costigan, now combined with Freeborn & Peters LLP, represents commercial interests in complex disputes in federal and state courts in NY and other jurisdictions. The firm also represents diverse segment of the insurance and reinsurance industries.**

## **Challenges**

- Locating text within multi-page image files was time consuming and inefficient
- Prior OCR engine took 8 hours to process files
- The engine would often crash when processing large files

## **PhantomPDF provided**

- The same workload completed in one hour vs. 8 hrs previously
- Foxit's OCR provided the highest accuracy rates
- Compression enabled files small enough to submit to Courts

“Foxit’s PDF Compressor with OCR was able to convert all documents into text searchable files, allowing for quicker searches.”

**HARGRAVES  
McCONNELL &  
COSTIGAN, P.C.**

# *The Simons Firm*

## Challenges

- Cost effective and easy to use for non-tech savvy users
- Managing very large documents (over thousands of pages)

## PhantomPDF provided

- Great performance converting documents and inserting stamps and bates numbers
- Easy scanning, converting, organizing, protection, annotations, and editing their PDF

**THE SIMONS FIRM**

Nationally Recognized – New Mexico Roots

CIVIL LITIGATION & APPEALS

TITLE INSURANCE DEFENSE

INSURANCE DEFENSE

REAL ESTATE & PROBATE LITIGATION

REAL ESTATE & BUSINESS LAW

CONSTRUCTION LAW

”Foxit PhantomPDF was cost-effective, but more important, it met or exceeded all of our needs”  
Samantha Garcia, Paralegal

## Foxit CASE STUDY



### Lavan takes its case to PhantomPDF *Business*—and never looked back

Like most law firms, Lavan's legal specialists handle large numbers of documents every day, and in the digital age this means a PDF editor is one of their go-to tools. Legal staff use features such as reading, merging documents, adding pages, deleting pages, editing text, highlighting text, signing, and redacting, all in a typical day.

For years, Lavan relied on the Nitro Pro PDF editor, which provided all the basic functions, but didn't offer integration with NetDocuments, their Document Management System (DMS). Lavan was the first law firm in Australia to choose NetDocuments, a secure SaaS cloud system, which is now commonly used in the legal sector. Integration with PDF editing software was important as it would enable users to work on PDF files from their NetDocuments accounts and make changes to their PDF documents, via a secure device, from wherever they were.

#### Nitro says no, while Foxit says go

With the need for NetDocuments integration increasing, Lavan's Manager of Information Systems, Marco Marcello, asked Nitro on several occasions if they would develop a NetDocuments integration, however Nitro continued to say no.

Since 1898, the Lavan name has been synonymous with one of Western Australia's most distinguished legal families and the independent law firm they created. The Perth-based firm offers specialised knowledge, local networks and firsthand understanding of the Western Australian business community to its clients. With one of the largest litigation teams in Western Australia, they provide legal advice on a wide variety of topics, including aged care, Asian investment, banking and finance, construction and infrastructure, corporate and commercial law, education,

## Challenges

- Users make changes to their PDF documents, via a secure mobile devices, from wherever they are
- Required NetDocuments integration (cloud DMS)
- PDF alternatives were costly

## PhantomPDF provided

- Around 100 of Lavan's employees use Foxit PhantomPDF
- Intuitive and easy to use
- No extra training and no complaints

“PhantomPDF quickly stood out from the other solutions we evaluated, due to its **speed, stability and ease of use**,” said Marco Marcello, Manager of Information Systems at Lavan.

# Additional Resources: Whitepaper, Article, How-To Document for Legal Professionals

**Table of Contents**

- Intro: Transform Your Documents
- Create Court-Friendly Documents
- Compile PDF Portfolios
- Redaction
- Sanitize Documents
- Bates Numbering
- OCR, Index, and Annotations
- Forms
- Signatures
- PDF Security
- Keep Files Organized

**Goir it an**

**DeeDee going digital**

**Paperless info** everywhere, at state court systems or a hospital will eliminate etc different. While ever be entirely goals for paper things to consist

- Getting data
  - Standardize
  - Compress
- Preparing documents
  - Real-time
  - Maintain information
  - Preventing users

**DIGITISATION**

Rates numbering and watermarking might be necessary to your case filings. Protecting client confidentiality may be needed. Redacting information to eliminate personally identifiable information from the document or adding tags for section 508 accessibility might be required. And with many electronic case-filing systems requiring PDF/A for long-term storage, converting PDFs to PDF/A becomes important to embed information, such as font libraries, so that PDFs can be read in the future. Using the right PDF software, all of this can be accomplished easily during conversion and can be automated across a large volume of PDF documents.

**Compression**

Many electronic filing systems will reject case submissions if the files are too large. Yet industry-leading mixed-raster content compression can result in file sizes of 100:1 for colour and 20:1 for black and white. Compressed files enable faster email and access to case documents, especially on mobile devices. Plus, smaller files reduce storage costs for organisations with large document repositories.

**PREPARING DOCUMENTS FOR ATTORNEYS OR SHARING WITH LITIGANTS**

Maintaining confidentiality of client information

To protect confidential information, such as social security numbers, before being shared or e-filed, law firms may be required to redact parts of a document during a legal proceeding. A lawyer can mark any part of a PDF for redaction and an attorney can approve the redactions before applying permanent changes.

**Preventing unauthorised changes**

As files are being downloaded from document management systems, knowing who can view the data is essential to track your documents and keep them safe from leaks. Using PDF applications, you can set a variety of security levels and control what people can do with the document. You can restrict someone's ability to copy text, delete pages, add comments, or print. You can even password-protect your PDF documents for extra security.

**Real-time shared reviews**

Like Google Docs, PDF documents can be shared with others and annotated in real time, which increases efficiency of team projects.

**ASSEMBLING DOCUMENTS FOR COUNSEL OR COURTS**

Bates numbering for easy indexing

During the discovery phase of litigation, documents might require unique identifiers on each page for reference and retrieval. Bates numbering (also known as Bates stamping, Bates branding, Bates coding, or Bates labelling) enables you to place identifying information, including company name, logo, numbers, date/time and copyrights, on them to identify critical content, such as images with copyrights.

**Portfolios**

When it comes to compiling information for case files, it is essential to accommodate different file types. With a PDF portfolio, you are no longer limited to PDF files. You can add audio, video, Word, Excel, HTML files and more into one digital binder, with subfolders for better organisation and easy access to data, making a PDF portfolio the perfect solution for e-discovery or deposition exhibits for a case.

**SUMMARY**

Using PDF, you can create, convert, comment and organise digital documents within a single platform that is easily shared and archived. What is more, paper to digital conversions of email, TIFF and Office docs to PDF/A, high-quality OCR and file compression can all be automated through high-performance servers to give any size of law firm these benefits.

**As Foxit Software's senior director of marketing, DeeDee Kato is responsible for leading Foxit's industry solutions. She has over 20 years of experience in product management and product marketing development, and launching strategic offerings at HP, FISCO Software, Fujitsu, Synectics (SIP former) and Accellion. Kato has a computer science degree from the University of California, Berkeley.**

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## Store

### FOXIT PHANTOMPDF FOR LEGAL PROFESSIONALS

**\$49.00 - \$99.00**

Foxit PhantomPDF for Legal Professionals is easy to read and full of numbered steps and screen illustrations. It focuses exclusively on topics relevant to legal professionals and skips those which are not. This Foxit PhantomPDF Manual is written with you in mind!

**License Type** Individual User License

[Clear](#)

Purchase this license if you alone will be using Foxit PhantomPDF Manual for Legal Professionals.

**\$49.00**

**ADD TO CART**

<https://www.affinityconsulting.com/product/foxit-phantom-pdf-for-legal-professionals/>

# 1. *About Foxit*



# Over 1B people use Foxit Technology!

**2006**

- Foxit Reader

**2007**

**2008**

- Foxit ActiveX SDK
- Microsoft Partnership with Foxit(PDF iFilter)



**2009**

- SharePoint
- Foxit PhantomPDF
- Foxit PDF Security Suite For Microsoft SharePoint, Windows Server, Active Directory RMS

**2011**

- HTC Flyer OEM
- Amazon Kindle OEM
- Foxit Android App



**2012**

- DocuSign iOS
- Microsoft Surface
- Foxit iOS App
- DocuSign Integration
- Foxit Microsoft Surface App

**2014**

- Google PDFium
- Dataintro Acquisition
- HP, Lenovo, Asus PC pre-install



**2015**

- documentun
- Luratech Acquisition



**2016**

- ConnectedPDF
- Foxit ConnectedPDF
- Foxit Redaction for Office
- Sumilux Acquisition
- Debenu Acquisition



**2017**



- Section 508 Accessibility
- New Product Award

**2018**

- Foxit PhantomPDF Mac
- Dell Partners with Foxit
- Panasonic Partners with Foxit for PDF Compression



**2019**

- RPA integration with UiPath

# Legal Industry Customers

**Baker  
McKenzie.**

**FAEGRE BAKER  
DANIELS**

orrick

Weil, Gotshal & Manges LLP

**Weil**

Simpson Thacher & Bartlett LLP

Simpson  
Thacher

mccarthy  
tetraault

VENABLE<sup>LLP</sup>

**MARKOFF LAW LLC**  
We collect results

**PEAU COCHRAN  
VERTETIS AMALA**  
ATTORNEYS AT LAW

**DAVIS  
SAPERSTEIN  
& SALOMON**

**LAVAN**

CLEARY  
GOTTLIEB

**HARGRAVES  
McCONNELL &  
COSTIGAN, P.C.**

**K | P | D**  
ATTORNEYS AT LAW  
KOPKA PINKUS DOLIN

anderson  
lloyd.

**Olinsky  
Law Group**  
A NATIONAL DISABILITY LAW FIRM

SCHILLER  
DUCANTO  
& FLECK<sup>LLP</sup>

Diepenbrock & Cotter LLP

**Fenwick**  
FENWICK & WEST LLP

**MEREDITH  
CONNELL**  
THE LAW FIRM.

Keoghs

**CORRS  
CHAMBERS  
WESTGARTH**  
lawyers

ashurst

EVERSHEDS  
SUTHERLAND

THE ZIMMERMAN  
LAW FIRM P.C.

**MURTHY  
LAW FIRM**  
Immigration Matters<sup>SM</sup>  
murthy.com

# Used By Major Companies and Public Sector

## PhantomPDF Customers



## Public Sector Customers

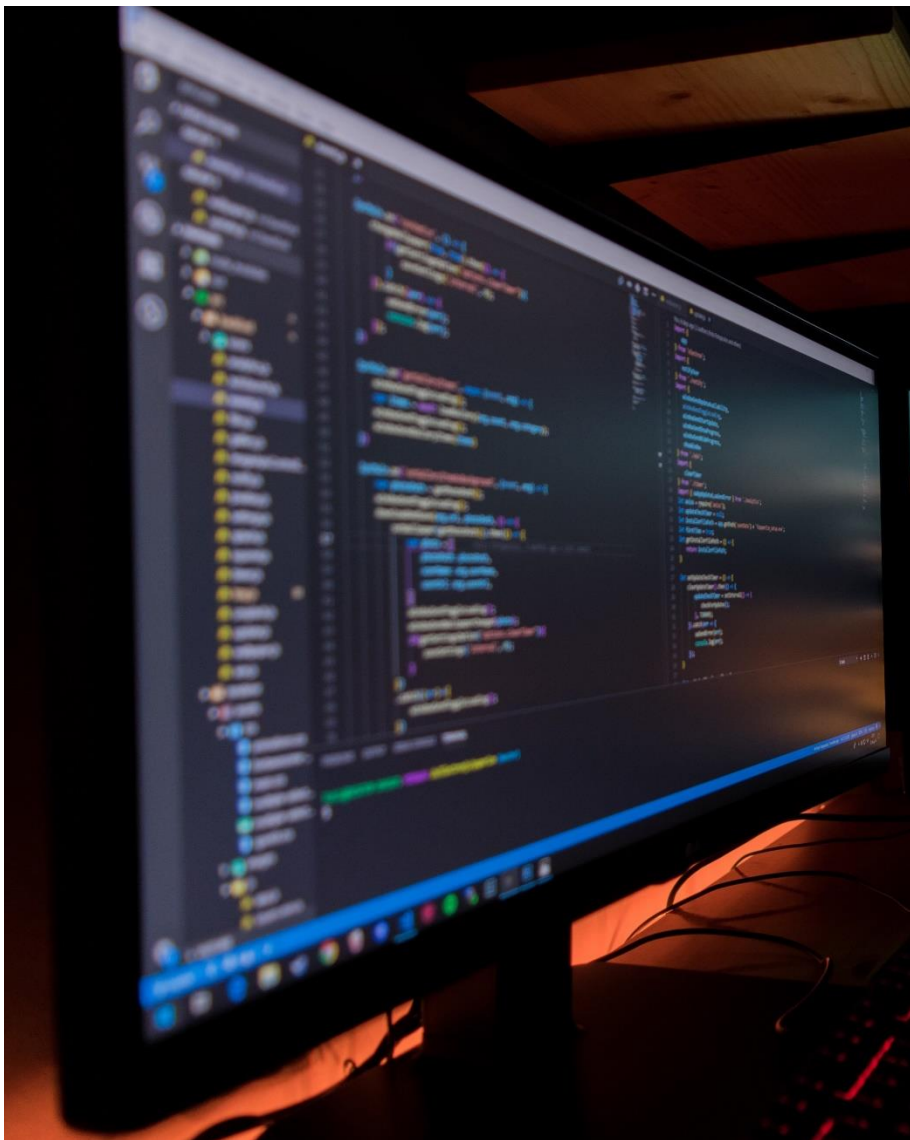


## OEM Customers



## SDK Customers





## Enterprise-wide control of of deployment

- **Supports Group Policy**  
Ensure standardization of menu and configuration settings
- **SCUP Catalog**  
System Center Updates Publisher (SCUP) in conjunction with Microsoft's System Center Configuration Manager allow administrators to more accurately and efficiently to update Foxit software without having to write a complicated query.
- **Installer Customization Tools**  
Available Customization Wizard and XML Editor to configure/customize the installer prior to organization-wide deployment
- **Registry Keys**  
Templates available for faster customization
- **Virtualization**  
Foxit works flawlessly with all major virtualization platforms

# ***What to look for when going paperless***

- 1. A vendor with a Singular focus on PDF technology for ongoing innovation and enhancements (PDF Association Board Member)***
- 2. A product with equivalent or greater functionality across the document lifecycle***
  - Edit text and images like a WORD document
  - ConnectedPDF
  - Easy back and forth conversion of Microsoft documents
- 3. Easy transition for new users – as a Microsoft partner, PhantomPDF offers the same toolbars and ribbons people are accustomed to using***
- 4. Cost-effective – typically 40% the price of Acrobat***
- 5. Perpetual and Subscription licensing***
- 6. Active feedback loop from customers allowing feedback to be incorporated into software upgrades and process improvements***
- 7. Strong commitment to customer support, resources and ongoing training***
- 8. Lightweight – easy to deploy without wasting valuable computing resource***



***Thanks***