



## AI-POWERED SMART DOCUMENT ASSISTANT ADDS CONTEXT TO LEGAL DOCUMENTS

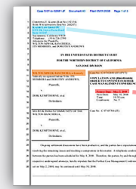
Canon's smart document assistant technologies learn to profile scanned and digital documents as they flow through a legal office to boost productivity and reduce manual processing errors.

Identifying a document's type and intelligently associating relevant contextual information that may not be contained within the document—such as matter number, client code, etc.—facilitates easier, automated ways for documents and the information they contain to enter digital workflow and storage solutions.

### DETERMINES SPECIFIC LEGAL DOCUMENT TYPE AND PREDICTS CONTEXTUAL INFORMATION NORMALLY ADDED BY OFFICE WORKERS

A document's profile needs to describe its type, the important data it contains, and its contextual relevance within an information ecosystem.

Associating these informational attributes with a document allows it to be easily and comprehensively identified, understood, and managed.



#### Information is extracted from a document:

Author/Source: US Energy Commission  
 Client involved: Modern Energy, Inc.  
 Document Date: 8/14/2017

#### Context is usually added manually:

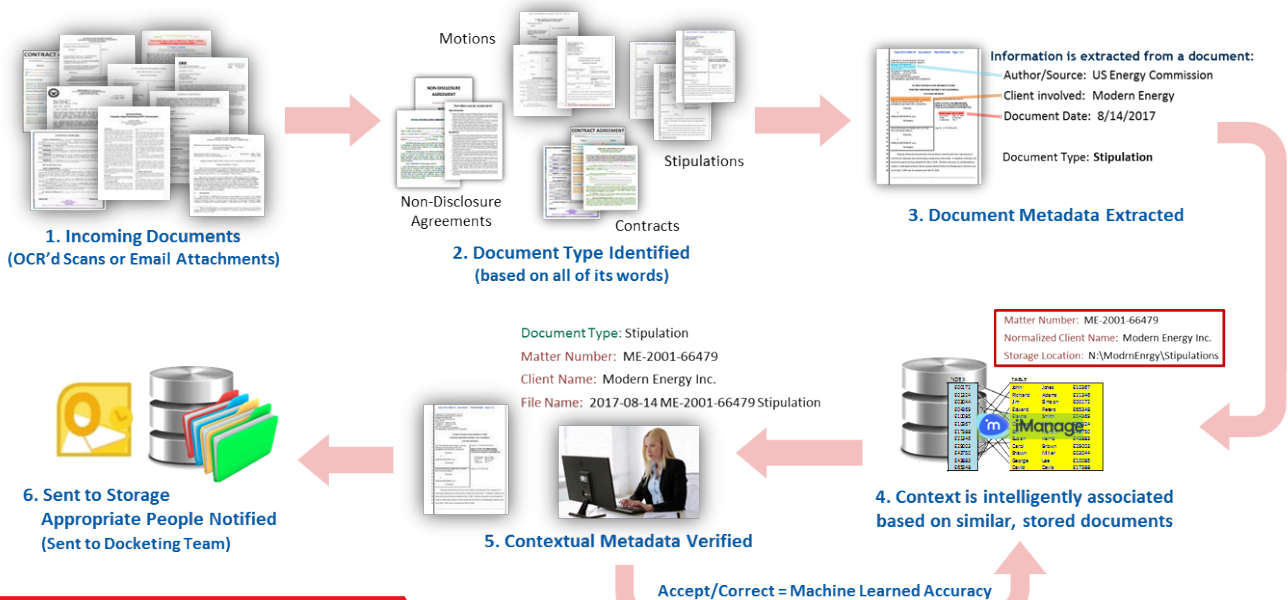
Matter Number: ME-2001-66479  
 Client Name: Modern Energy Inc.  
 Lawyers involved: R. Johnson, C. Smith

Document Type:  
**Stipulation**

Canon's artificial intelligence (AI) software provides assistance to office personnel when dealing with the growing volume of electronic and paper documents flowing through the office daily



- **Automatically classifies** legal documents by type (stipulation, contract, non-disclosure agreement ...)
- **Learns** to intelligently associate analyzed documents with corporate contextual information.
  - Ex: **Learns** matter numbers for documents containing certain company names and keywords.
- **Facilitates workflows** for email notifications of document arrival or for routing to a docketing app.

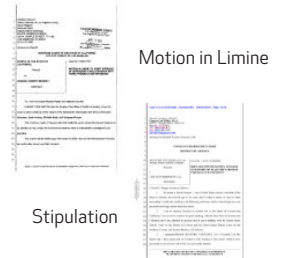




# AI-POWERED SMART DOCUMENT ASSISTANT CAPABILITIES AND FEATURES:

## Predicts document type based on all identified words and phrases—not just keywords

- Pre-trained to recognize a variety of litigation and court document types.
  - Can be trained to recognize company-specific document types.
- More tolerant of OCR errors than keyword, and rules-based recognition technologies.
- Very similar docs can be uniquely identified—unlike visual layout-based recognition technologies.
  - Ex: can easily distinguish between a “Motion in Limine” and a “Stipulation”.



## Learns to associate incoming documents with normalized client names and matter numbers

- Detects informational facts within an incoming document’s text (who, what, when, where ...), regardless of where they are located within unstructured and semi-structured documents.
- Then locates an existing corporate folder storing a document group that has similar informational attributes to intelligently associate the client name and matter number that has been added to those documents.
- The software examines the existing metadata indexes managed by a document management system and does not need to crawl/index a company’s proprietary documents itself.
  - Automatically identifying new client names and matter numbers is especially useful for dynamic office environments with ever-changing client/matter lists.
- Can learn to appropriately associate custom/additional contextual metadata that is associated with particular document groups with incoming documents.



## Boosts productivity and reduces manual processing errors

- A user verifies the accuracy of a document’s associated metadata or adds additional information through either a Web-based UI or an Outlook add-in before delivery to the (iManage™) document management system.
  - The iManage™ DMS will process submitted documents to extract/index metadata from within a document, so only the associated contextual metadata added to a document will be delivered.
- Email notifications of a document’s arrival can be sent to the most relevant people from within the UI.
  - The software learns to suggest which people a user should notify about new documents for each.



## Learns from its own mistakes—and from user acceptance

- User acceptance or correction of predicted metadata associations validates or negates metadata prediction.
- This user behavior provides a “machine learning” feedback loop that enables accuracy improvement over time.
- This is a “probabilistic system” that indicates its confidence level on the accuracy of its predicted metadata associations based on what the system learns about the company’s information ecosystem.
  - Unlike “deterministic systems” that only provide a response if a document exactly matches the rules that were written to describe a document type.

## Can be deployed on premise behind a corporate firewall or in a private cloud

- Secure user login and permissions are synchronized with Active Directory™ or iManage™

