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## Bringing Paper Legal Documents Into Electronic Systems

By Steven Perry

In the legal industry, it's very clear that paper is here to stay. Whether it's pleadings, filings, evidence, exhibits, or other documents, paper formats are still a dominant factor in many law firms today. As much as we want to reduce its presence for numerous reasons, that tide of paper isn't going away. In fact, for some firms, it continues to rise. That's why law firms of all sizes need non-disruptive strategies that support efficient "coexistence" of paper and electronic documents and records.

In the past 2 years, Zimmer Kunz, PLLC has dramatically upgraded its technology platform and deployed a new system to electronically capture, convert, process, and route paper documents and tie them into the firm's document management system. This implementation has created significant improvements in the firm's ability to collaborate effectively, streamline document management processes, and lower costs.

### A NEW WAY TO CONNECT PAPER AND ELECTRONIC INFORMATION

As a regional firm specializing in civil litigation, Zimmer Kunz is headquartered in Pittsburgh, PA, and operates several satellite offices that serve clients in Pennsylvania, West Virginia, and Ohio. The firm's 33 attorneys are constantly on the move from location to location or taking depositions and overseeing discovery processes anywhere in the country. That mobility

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places an extra burden on the firm's IT foundation, particularly when it comes to paper documents.

In 2004, Zimmer Kunz initiated a complete refresh of its technology base. It upgraded hardware and operating systems, and deployed a new fleet of laptops. One of the keys to this upgrade would be the ability to handle electronic documents, scanned images and files, and e-mail attachments. The sheer volume of electronic documents — and the CPU horsepower and network bandwidth required to accommodate them — were key factors in procurement decisions.

The firm places a strong emphasis on centralized manageability, which is why all employees now use Citrix MetaFrame systems to access and use their Windows applications. This is particularly valuable in supporting remote users at branch offices and in the field, where there is no local IT assistance.

Zimmer Kunz has adopted the Hummingbird Enterprise DM as its centralized document repository, which presently manages approximately 600,000 documents. What the firm needed was a smart way to integrate paper documents into its processes and efficiently route them to the people who needed to see and use those documents. The alternatives are not appealing:

- **Fax the document.** For lengthier documents, faxing can be time-consuming and memory-restricted.
- **Ship the document by courier or overnight package delivery.** These are slower, more expensive processes with charges that are difficult to pass through to the client.

Zimmer Kunz began to examine the

possibilities of scanning paper documents and looked at different alternatives in 2004. It found that every major digital-photocopier manufacturer had some type of offering — but each was a proprietary solution that did not necessarily suit the firm's particular needs. Most would have required users to walk up to the multi-function devices (MFD) and use touch-screen panels to perform basic scanning and routing.

These solutions were unattractive to Zimmer Kunz for several reasons. First, the small touch-screen panels are not easy interfaces to use. They present multiple screens and cryptic codes to master. Second, the MFDs couldn't support multi-step tasks, such as scanning a document, e-mailing it to opposing counsel, faxing it to the client, and archiving it in the Hummingbird Enterprise DM system as a single process.

Only two hardware vendors could actually scan documents directly into our Hummingbird system — and neither of them did so in an efficient manner. Each presented technical compromises such as large file sizes, bandwidth consumption issues, and the need for translation services to map fields in Hummingbird or Microsoft Exchange.

### SEEKING AN INTELLIGENT ALTERNATIVE

Zimmer Kunz then began an evaluation of third-party solutions and selected Omtool's AccuRoute for document capture, processing, and distribution to integrate paper and electronic documents. The key to AccuRoute is the Embedded Directive — the encoded routing instructions that the MFD reads and follows.

- **For Hard Copy Documents.** When routing hardcopy documents, the user

places the Intelligent Routing Sheet on top of the document before scanning into the AccuRoute server. The Embedded Directive contained in the Intelligent Routing Sheet is sent to the AccuRoute server which “reads” it to identify the delivery specifications, processes the document, and delivers the content in the required formats based on user choices and delivery preferences.

- **For Electronic Documents.** AccuRoute performs these same processing, delivery, archiving, and tracking steps on documents originating in electronic form, as long as the embedded routing instructions are included with the document.

In either instance, those routing instructions can contain several steps for distributing documents simultaneously, such as e-mailing, faxing, and archiving a document into most electronic information systems or translating the scanned information into a PDF, a searchable PDF, or a Microsoft Word file.

While the option to access AccuRoute directly from a MFD's front panel is not currently utilized, that option is available with configurable single-touch personal and public distribution folders. AccuRoute provides that functionality in partnership with MFDs featuring the embedded Java platform. This is a great option for firms who prefer not to use Routing Sheets.

### EASY DEPLOYMENT

There were several reasons for Zimmer Kunz's selection. First, AccuRoute is hardware-independent and works with all networked MFDs — from simple Hewlett-Packard 4100s to the firm's high-end Ricoh and Xerox MFDs. That allowed the firm to conduct an aggressive open-bid procurement process for hardware and obtain the best possible prices.

From a deployment perspective, the AccuRoute implementation was very straightforward for the firm's Citrix environment. AccuRoute was loaded on our three Citrix MetaFrame servers — and sidestepped the challenges of installing on 70 desktops. Some users have notebook PCs, which required separate installations as well.

After the scan is complete, the MFD simply FTPs the scanned image to a shared network drive. All the firm's staff had to do

was point AccuRoute to the location of that drive. AccuRoute then continuously monitors that location to look for routing sheets and perform any routing instructions that it finds.

AccuRoute integrates extremely well with the Hummingbird Enterprise DM system used by the firm — with efficient file sizes and low bandwidth consumption. The user simply uses an Intelligent Routing Sheet to direct AccuRoute to deliver the scanned content to Hummingbird.

AccuRoute can be used from desktop computers where users can take full advantage of a Windows interface and keyboard. That ability avoids the cumbersome entries at the small touch-screen panel on the MFD. The Intelligent Routing Sheet can also contain client-billing codes for precise charge-backs.

### SAVING TIME, SIMPLIFYING DOCUMENT SHARING

As for the predicted demise of paper documents in legal processes — don't believe it. Zimmer Kunz is constantly inundated with paper documents. A classic example: a 100-page set of interrogatories from plaintiffs' counsel that arrives by overnight courier. Previously, one of the firm's administrative staff would literally create a Microsoft Word document and retype those questions into a new file — a mundane, low-value task. Now, an Intelligent Routing Sheet can be placed on the top of those 100 pages, and run through a MFD to instruct AccuRoute to use optical character recognition (OCR) to create a Microsoft Word file from the 100-page document and e-mail it to the attorney who must respond. That one example could save several hours of administrative time.

And, for common, repeated tasks, Intelligent Routing Sheets can be reused. For instance, if a partner is often traveling but wants to read the paper mail that arrives each day from the postal service, an administrative assistant can open and collate the mail and scan it on the MFD with a

reusable cover sheet that instructs AccuRoute to deliver the scanned images by e-mail to the traveling partner. In his or her hotel room, the partner receives an e-mail with attachments — images of that day's mail.

The firm also found that “scan to my in-box” is a common and popular use of AccuRoute and the MFD. That enables the user to put the reusable cover sheet on top of any paper document that he or she wants to e-mail to him or herself. It's simple, fast, and very useful. Using desktop replication of a Microsoft Outlook mailbox, it is a simple matter to store large documents to a laptop user's local PC when they cannot connect to the network.

And, for attorneys who collaborate over great distances, AccuRoute and Hummingbird are enabling the firm to share and collaborate on legal documents, exhibits, pleadings, and other paper materials easily, quickly, and inexpensively. The costs and delays of chasing down files and couriering or faxing them to one another are avoided.

Not surprisingly, Zimmer Kunz has reacted very favorably to the new implementation. The common reaction: “How did we ever manage without this?” Especially as more court jurisdictions mandate electronic filings, I'm certain that the AccuRoute and Hummingbird deployment will continue to pay for itself by helping Zimmer Kunz support more attorneys with the firm's current administrative staff.



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