

Forward-Thinking Firm Turns to Upland AccuRoute to Digitize Paper and Create All-Electronic Case Files

The Challenge

This legal firm needed an effective way to capture the many paper documents that comprise a case file – such as correspondence, pleadings, evidence, and materials from opposing counsel – and make them electronically accessible so that the entire case file was comprehensive, complete, and digital. Collecting electronic documents and e-mail didn't pose too great of a challenge, but when it came to paper, the firm struggled.

According to Monroe Horn, chief technology officer for Sunstein, Kann, Murphy & Timbers LLP, the firm has made a strategic commitment to build what he refers to as the “electronic file.” “Our objective was to give every attorney with a PC and a network connection access to the entire client file from virtually any location,” he said. “We made a strategic decision to standardize our document workflow by using Adobe's® Portable Document Format [PDF]. What we needed was a way to digitize paper and create searchable PDFs that we could store in and retrieve from our Interwoven document management system [DMS]. “

Sunstein, Kann, Murphy & Timbers LLP had previously invested in a series of Canon multi-function peripherals (MFPs) and HP Digital Sender devices. The ability to integrate with and leverage those machines was the first of several key requirements. “We looked at a variety of different document handling solutions,” said Horn, “and during our evaluation process, we learned a few important things with respect to usability.

“The first is that to achieve the greatest productivity, you want the user to spend as little time as possible at the MFP. A touch screen at the scanning device isn't a great data-entry interface; it wastes users' time and can create backlogs and queues as people wait their turn at the MFP while someone henpecks in different routing instructions. We wanted a solution that would let our people work at their desks and then simply walk up, place their documents into the document feeder, push a button, and let the system handle all of the conversions and routings. We wanted the utmost flexibility.”

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With 47 attorneys and 66 support staff, Boston-based Sunstein, Kann, Murphy & Timbers LLP, provides legal representation with a focus on intellectual property, including patent, litigation, prosecution, and portfolio development. Trademark, copyright portfolio development, and business transactions are also key areas of expertise. For more than 30 years the firm has been working with clients in a range of industries, including financial services, pharmaceutical, computer, semiconductor, electronics, and consumer products.

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The Change to Electronic Case Files

After completing its review of various commercial offerings, Sunstein, Kann, Murphy & Timbers LLP selected AccuRoute to capture, process, and distribute its paper and electronic documents. The key to AccuRoute is the Embedded Directive – the encoded routing instructions that the MFP scans sending directions to the AccuRoute server for conversion and delivery. To route hardcopy documents, the user uses his desktop PC to define the conversions and destinations. AccuRoute translates those instructions into Embedded Directives that are printed out onto the Intelligent Routing Sheet that is placed on top of the document stack before scanning. The AccuRoute server “reads” those instructions on the top sheet to identify the delivery specifications, processes the document, and delivers the content in the required formats based on the user’s choices and delivery preferences.

AccuRoute also 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 text-searchable PDF, or a Microsoft Word file.

“We just love the flexibility that Upland demonstrated with AccuRoute,” said Horn. “We looked at what our people needed to do each day, from preparing a filing for a major litigation effort to routine scanning. In some cases, pre-defined, reusable routing sheets are extremely useful. In

other instances, an attorney might need to capture different documents for different cases or non-routine matters. With this system we have the flexibility to define the best processes for all our people to make AccuRoute work for us.”

During the initial implementation, an Upland engineer worked on site. “The implementation only took a couple of days,” Horn said. “Then we spent a few weeks to creating customizable configurations. We spent the most time learning how our people work and then creating custom documentation and an extensive series of use cases so that they had very specific instructions on how to use AccuRoute. We were determined not to simply show them a few features and leave it to them to figure out. Instead, we showed them the best ways to tackle their daily work.” Mandatory training sessions for administrative staff took 30-60 minutes. Afterward, the implementation team conducted follow-up sessions, helping each staff member create their first Intelligent Routing Sheets.

Information All in One Place

Each year, Sunstein, Kann, Murphy & Timbers LLP processes more than 400,000 pages of paper documents. Capturing these documents electronically creates significant hard-dollar cost savings, but the real savings extend far beyond that. “This system, frankly, isn’t just about cost savings,” said Horn. “It’s about giving our attorneys the information they need to represent our clients effectively and efficiently. We aren’t exclusively electronic yet, but we can see all of our documents in one place, which helps us understand cases better and provide better service. We’re not hunting down paper correspondence or trying to locate data buried in a case file. It’s all in one place is wherever the attorney is.”



About Upland Software

Upland Software [Nasdaq: UPLD] is a leading provider of cloud-based Enterprise Work Management software. Our family of applications enables users to manage their projects, professional workforce and IT investments; automate document-intensive business processes; and effectively engage with their customers, prospects and community via the web and mobile technologies. With more than 4,000 customers and over 450,000 users around the world, Upland Software solutions help customers run their operations smoothly, adapt to change quickly, and achieve better results every day.