



## Washington State Court of Appeals

CUSTOMER CASE STUDY - LEGAL

### Profile

The Court of Appeals administration department is responsible for receiving cases for review, determining course of action and assigning Case Managers and a panel of Appellate Judges. They are responsible for all documents.

**DocuShare and Xerox Document Centres save considerable time and cost for the Washington State Court of Appeals by streamlining document management.**

### The Challenge

The Washington State Court of Appeals has a desire to implement a collaborative sharing document repository of cases such that both hard copy and electronic file reports can be easily imported and shared amongst its judges and members. The documents must be indexed for easy retrieval and their document date must be represented as the system creation date.

The documents comprise of legal cases and their associated documentation subject to review by the Court. In addition to sharing documents, the Court desires to enable an electronic workflow process to better facilitate the Justice's time in reviewing and commenting on motions scheduled to be heard. At specified times, documents are to be archived to near line storage.

### The Solution

#### Document Archiving - DocSlide

The project is to provide a means for the COA to share collaborative legal works over the intranet by using DocuShare. The collaborative works will be imported from both hardcopy-scanned documents and electronic file reports into a well-defined electronic filing cabinet. The objective of the filing system is to organize the documents by associated case number and related index categories (including but not limited to the filing date) as defined by the COA. The document import index structure (Import Template)

should lend itself to a comparable customized search template. Design considerations should include standardization for index fields, such as document date structure. Hardcopy-scanned documents will use a cover sheet template prior to scanning. The cover sheet will provide the index attributes for the scanned documents. Scanned Documents will be ported to a designated folder for automatic posting to the appropriate DocuShare collection. Electronic file reports would be created using MS Word where the MS Word

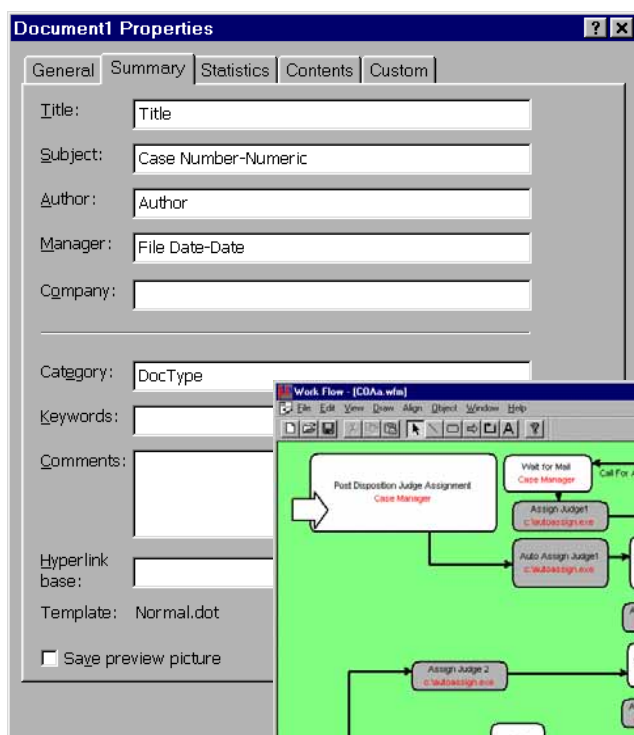
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summary feature will be used as the Import Template. Electronic file reports will be saved to a designated folder where the summary information will be used to build the Meta index tag before being ported to the appropriate DocuShare collection. All documents will be converted to Adobe PDF prior to being archived.

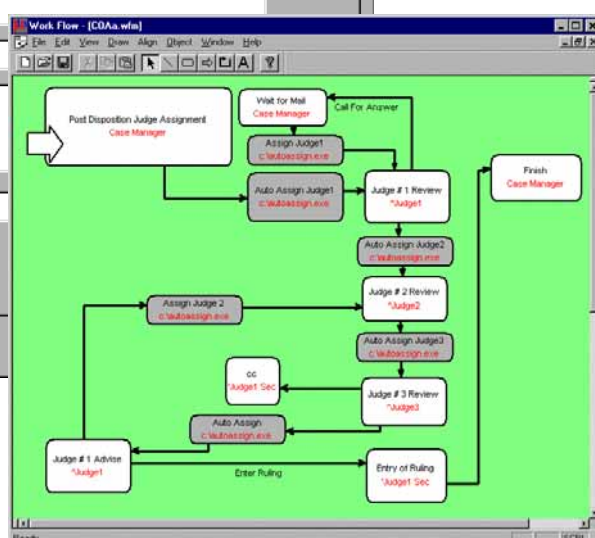
In conjunction with the electronic filing cabinet, an application will be developed to build a Court Calendar Date collection. This collection would be created by filling out an electronic form that would include the date the case(s) is to be heard

and case number(s). The application would then have the case collection folders automatically linked into the folder for the court date. The collection would report the cases and their associated documents for viewing.

Certain selected case documents (as defined by COA) would be made available via a Workflow application. This application would allow the Case Manager to send such documents as opinions, motions, etc. to judges for review and comment. Judges would have the provision to make comments prior to passing on the documents and their comments to the next succeeding judge. After the case workflow has completed the predefined routing, the documents and the associated comments would return to the case manager. Provisions will be made in the circulating of the documents to 'hold' the process until certain actions, such as call for Answers have been met.



Typical Indexing Method  
of mapping MS Office  
Properties to DS Meta  
data and collection  
definition.

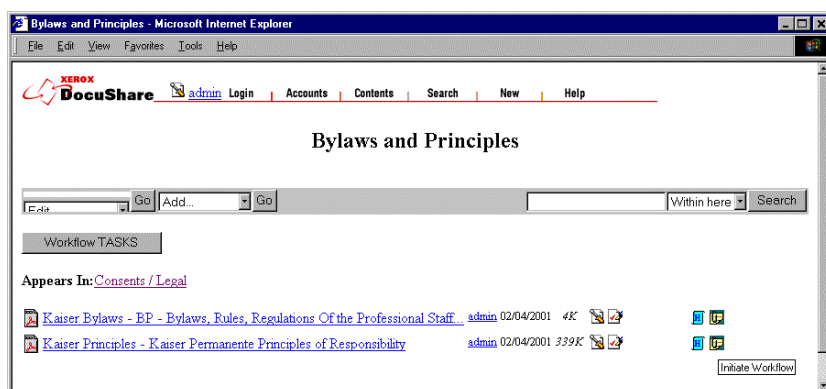


*WorkFlow Process  
using DocuShare.*



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*Typical WorkFlow Tasks identified by wf icon.  
Special file history report icon.*

#### Single Logon Utility - Latch

A NTLM bind utility will be included to provide the members of DocuShare a single log on facility. Utilizes the password management, aging, and robustness checks of your main system to guarantee DocuShare access control.

#### Automatic Collection/File Migration - Mallard

An administrator controlled function that allows specific files and collections by date to be migrated and deleted from the DocuShare repository. The files may be deleted, or archived off the server.

#### Remote File Sharing - Silo

An administrator controlled function that allows collections to be published to another storage device and to maintain the collection's

attributes and search criteria.

Designed for members who wish to work offsite and return the collections and files back with their original attributes to their original location. Collections are copied with DocuShare properties. Version control track changed documents.

### Summary

Utilizing two Xerox Document Centre multifunction devices, the Court scans hardcopy documents using indexing DocSlide templates that automatically build Meta data and collections for DocuShare. Electronic documents are automatically posted to DocuShare by customizing

the MS Office properties to provide a index and collection map to DocuShare. Documents are scheduled for workflow by the Case Manager and processed to the appropriate sitting Judges for comments, opinions and decisions. Upon completion of the workflow, the case is returned to the case manager for final disposition. Cases that are completed are archived to near line storage using both Silo and Mallard. All DocuShare document dates are the effective date of the document. Administrators may track document usage by selecting the File History icon located adjacent to the workflow icon.

Prior to the implementation of this solution, Court Clerks and Administrators were required to deliver cartloads of case documents to sitting judges at considerable expense and time. Today, all case participants search for the case number collection using the DocuShare search template.

#### File History - Report Generator

An administrator controlled function to determine file access activities. The File History report shows who and when the files were accessed.