

# Safety in the Interest of our Clients

kbz. Rechtsanwälte  
Steuerberater

Law and Tax Firm



## Summary

Customer	kbz. Rechtsanwälte Steuerberater
Year Established	1991
Locations	Frankfurt/Oder, Berlin, Potsdam, Fürstenwalde, Eisenhüttenstadt, Cottbus, Slubice
Branch	Law and Tax Firm
Website	www.kbz24.com

The Law & Tax Firm KBZ covers the entire spectrum of legal affairs, and thus manages a large amount of paperwork in addition to the files needed for court. With Canon's information management solution Therefore™, all files are systematically and safely archived. By integrating Therefore™ to the firm's legal software, RA-Micro, the archiving process is seamlessly integrated into their daily processes.

Case Study  
Document Management

### The Challenge

With the introduction of a personal insolvency law in 1999, the number of mandates increased significantly. "In this business there is a distinct phase, so-called good conduct of debtors. Here, they have to prove all income and expenditures to us. This results in a huge amount of documents, so we decided to digitalize that process," says Dr. Jens P Kroll, a lawyer at the firm.

Using a document scanner, the documents are digitized and indexed using the market leading legal line of business software, RA-Micro. The PDF files used to be

saved in a classic Windows® file system. This convenient solution served as a digital archive for over a decade. However, this solution was far from perfect: files would get accidentally deleted and had to then be recovered from daily backups, which cost a lot of time. "We were looking for a solution which would be more secure for us on a daily basis, because in the meantime, the number of insolvency claims had risen to over 4000. Moreover, we wanted to archive finalized cases from other legal activities" says Jens P. Kroll. Through the firm's IT consultants, they heard about Canon's solution.

Rechtsanwälte  
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**kbz.**

**Canon**

„Canon worked with us extensively to learn the processes of our law firm. This was decisive to the project's success. By understanding of our firm's situation, they were able to scope, implement and configure Therefore™, so that it optimally supports our operations.“

Dr. Jens P. Kroll, Lawyer kbz. Law and Tax Consultancy

## The Solution

Today KBZ archives all incoming documents and files with Therefore™, Canon's information management solution. Unlike their previously used folder structure, Therefore™ integrates with the firm's line of business software RA-Micro. This includes a workflow to tie the archiving process optimally to the firm's ongoing processes. Data from RA Micro's server is exported to the Therefore™ Server, so that Therefore™ is always up to date. „Especially with the debtors' good conduct process, we have to collect all kinds of documents, proving our debtors' expenditures to enable payments to creditors. We gather all of this paper together and scan it to Therefore™ using a designated scanner,“ explains Jens P. Kroll.

Transferring information to Therefore™ was easy since it was possible to use their previous Windows® folder structure to create categories in Therefore™. „We used the FiletoTherefore XML tool as part of the migration,“ says Norbert Loddock, Canon Business Center Manager, in Berlin. The structure was transferred and imported to Therefore™ using an XML file.

Special attention was paid to the connection with RA-Micro. „The close integration with RA-Micros is optimal and lead to the project's success. The close integration

Therefore™ has with RA-Micro makes this a path breaking program for other law firms,“ says project manager Loddock. All briefs written by the firm's 13 lawyers can be saved directly to Therefore™. Relevant data like certificates, names, and more are recorded in Therefore™ archives, and can easily be found using search criteria. The same goes for importing documents using a document scanner. Indexing in Therefore™ is easy, because all data from RA Micro are already available on the archiving server. Users simply key in the dossier's file number in Therefore™'s user interface to link the scanned document with the relevant process. Saved data can be found, processed, and once again archived.

## Using the Solution

„With Therefore™, Canon's document management solution, our data is absolutely secure and finding information is very easy and user friendly. In addition, Canon worked with us intensively to learn our processes. This was decisive to the project's success,“ says Dr. Jens P. Kroll.

With the change from a rigid folder structure to a powerful document management system, the company reorganized a lot of processes. All documents and information is saved in a secure and structured manner,

in accordance with RA Micro. When documents are scanned using the Therefore™ Capture Client, all documents receive appropriate index data. Then all documents can be effortlessly found using an index data search or full-text search, even years later.



Lawyer, and member of the KBZ Law Firm, Dr. Jens P. Kroll

**Canon**

Canon Europe Ltd  
3 The Square  
Stockley Park  
Uxbridge  
Middlesex  
United Kingdom  
UB11 1ET  
Tel +44 208 588 8000  
Fax +44 208 588 8001  
canon-europe.com

Canon Deutschland GmbH  
Europark Fichtenhain A10  
47807 Krefeld  
Tel +49 21 51 3 45 0  
Fax +49 21 51 3 45 102  
canon.de

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