

LEGAL MANAGEMENT



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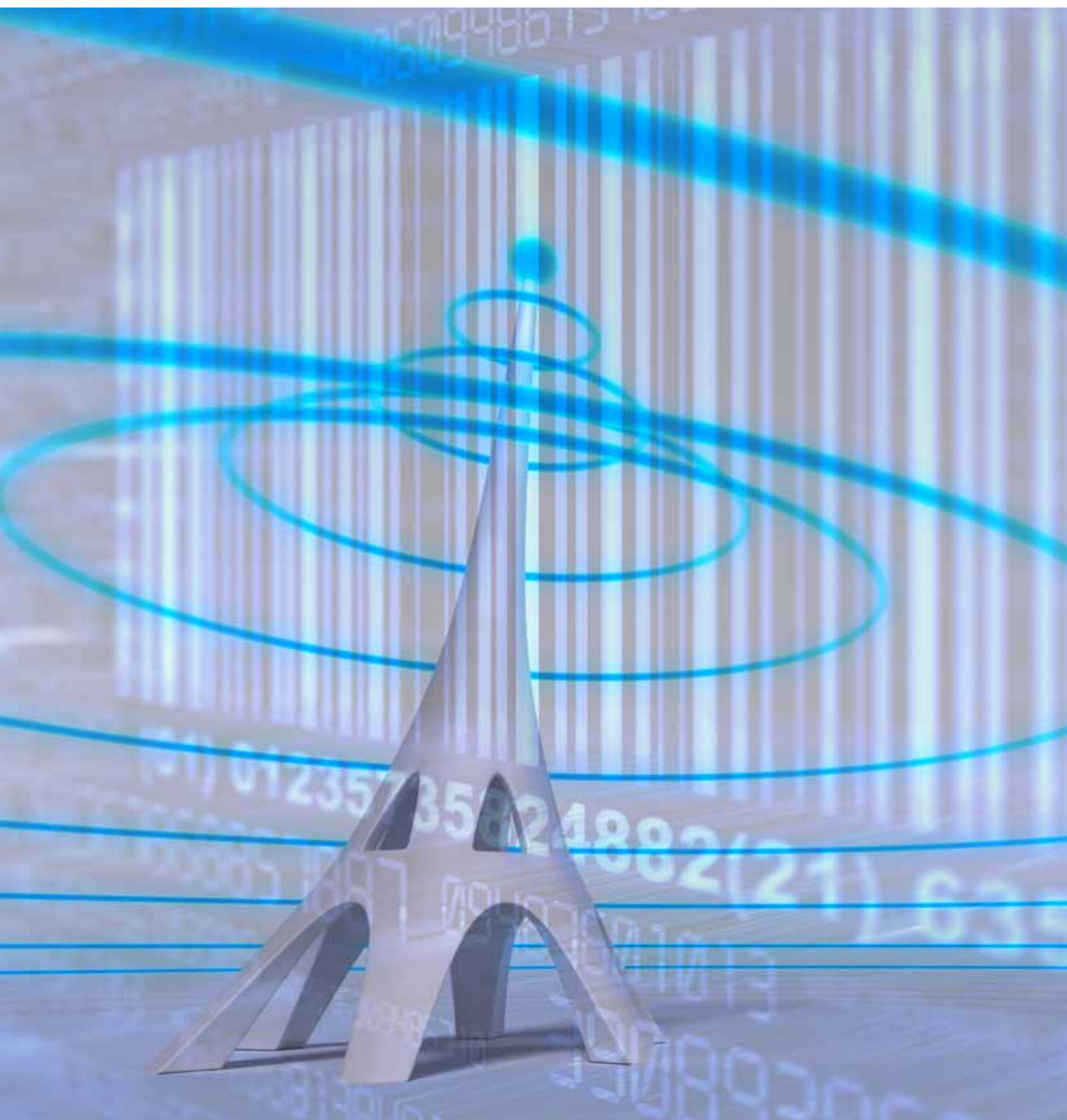
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Your connection
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CASESTUDY





on the *fast track*

Despite implementing a bar code-based file tracking system, North Carolina-based Poyner Spruill LLP still struggled to keep track of physical files until it added radio frequency identification (RFID) technology.

THE CHALLENGE

Keeping track of the physical locations of files was a routine challenge for the Records and Information Management Department at North Carolina-based law firm Poyner Spruill LLP. Despite using bar coding, the constraints of limited staffing and the time involved scanning each file meant that weekend and after-hours work was routinely required to complete audits. Recently, the firm added an RFID solution to its bar coding system, thus eliminating the need for weekend work and reducing potential overtime labor costs.

THE SOLUTION

In late 2009, Poyner Spruill implemented the RFID Integration Kit from FileTrail Inc. The kit added the power of RFID technology to the firm's existing CA Records Manager system (CARM, formerly MDY FileSurf).

The cutting-edge RFID solution has significantly accelerated the speed at which records management tasks can be performed. The ability of RFID to instantly read stacks of files from a distance is the key to time savings. The bar coding in CARM requires line-of-sight to read a file and, thus, individual handling of each file.

"It was easy to make a strong business case to become an early user of this innovative product," said Ray Lichtner, a member of the Association of Legal Administrators (ALA) and Poyner Spruill's Director of Administration.

The firm's Trusts & Estates practice area was the first to implement the RFID technology. This area has numerous individual clients and, thus, a large number of files handled by many people within the department. Trust & Estates files frequently include extremely important original documents and tend to exist in an active status longer than other legal files.

Ray Lichtner, Director of Administration, POYNER SPRUILL LLP



FileTrail's **RFID solution** will allow us to **pass on the benefits** of better **file management** to our clients through **faster service** and **lower overhead costs**.

"Several people work on the file from time to time, and we often work with attorneys in the firm outside our section who may also need access to the files," said Craig Dalton, a Partner at Poyner Spruill and Section Leader of the Trust & Estates practice area. "The new tracking method will help us quickly locate files and improve productivity."

LOCATING MISPLACED FILES QUICKLY

One of the solution's most important tools is the FileDetector™. This function on the portable RFID reader allows staff to hunt for files, like using a metal detector. The 8-foot read range makes it easy to find files that are needed critically. An audible alert and a description on the RFID reader's screen help to identify which file is needed and by whom.

"Using the FileDetector, we were able to locate a mis-file in less than 30 seconds, a task that could potentially take hours," said Bradlee Davis, Records Manager at Poyner Spruill. "The result is absolutely phenomenal! Missing or misplaced files have wasted many hours of staff time in the past."

"This will save an enormous amount of time searching for files by narrowing the location quickly," added Sara Moerbe, a Secretary in the Trust & Estates practice area. "I'm excited that our practice area is the first to use it!"



The FileTrail portable RFID reader automates tracking with its Audit and FileDetector features.

AUTOMATING AUDITS

Another vital part of the solution is the Audit tool on the portable RFID reader. This tool allows physical audits to be conducted in 70 percent less time than auditing using bar codes. Conducting an audit updates the locations of all files to reflect where the files were actually found.

According to Davis, a standard work room in the firm contains approximately 62 linear feet of bar coded files. The staff would spend a minimum of 35 minutes performing a complete audit by scanning FileSurf bar codes. That same room is now being audited in 10 minutes or less using RFID.

"With FileTrail, conducting audits now takes a fraction of the time," said Davis. "This allows us to complete our daily workload without weekends, which cuts labor costs for the firm."

AUTOMATIC TRACKING

One reason that the firm selected FileTrail was the SmartOffice™ technology, which it expects to implement later. This technology allows RFID sensors to track file locations as they move between offices, cubicles and doorways. SmartOffice locations can be added at any time in any location determined to be cost-effective, allowing the solution to grow and change with future needs.

The RFID Integration Kit can be expanded with passive sensors under desks, in ceilings and over doorways to automatically track files as they move. These sensors can be adjusted to read from 1 to 12 feet away so that each perfectly fits the needs of its location. A sensor under a "drop-off table" in the file room automatically checks files in as they are returned. Sensors at a doorway allow exits to be alarmed to prevent removal of files or assets using lights, a siren or e-mails to administrators.

QUICK IMPLEMENTATION

The FileTrail RFID Integration Kit allows RFID to be added to an existing tracking system using

Saving Time and Labor Costs with RFID

Radio frequency identification (RFID) technology offers many benefits to law firms:

- **Simplify Check-Out:** Files are checked out quickly because RFID can identify all of the files in a stack at once – with no need to handle each file individually. Also, a “Self-Check” process allows staff to present their badges and then walk away – the RFID tags in the files they carry are read, and those files are automatically checked out to them.
- **Automatic Check-In:** Files are automatically checked in as attorneys and staff drop files on a returns table. The RFID tags in the files are read to identify the files and log the dates that they were checked in.
- **Like Using a Metal Detector:** The portable FileDetector finds files in a fraction of the time that manual searches require. With an 8-foot read range, the FileDetector lets you quickly scan offices and cubicles for missing files. You can find mis-filed files quickly by simply waving across the shelves.
- **Faster Audits:** The portable reader cuts the time to complete routine audits by as much as 85 percent. Audits update all of the file locations and alert you to any “missing” items you stumble across.
- **Faster Archiving:** Boxing files is faster and easier with RFID. Simply scan the box bar code, and then batch-read all of the files with RFID.
- **Passive Tracking:** Files are tracked automatically as they move without requiring any action from staff. With read ranges adjustable from 1 to 12 feet, RFID sensors in hallways, under cubicle work-surfaces, in office ceilings and in doorways automatically log the locations, dates and times as files move.



An RFID sensor under a work surface automatically checks files out to the person who works there.

connectors or web services. Integration is fast and easy and requires no labor from the vendor of the tracking system. This allows organizations to leverage their investments in existing tracking systems while gaining the economic and other benefits of RFID technology.

“I am impressed with how quickly the implementation process was done, the seamless integration with our current system and the friendliness of the FileTrail interface,” said Davis.

THE BOTTOM LINE

While keeping track of physical files used to be a problem at Poyner Spruill, the firm’s new RFID capabilities have allowed the firm to do more and reduce costs. Overtime labor costs have been reduced, less time is spent searching for files and service to internal customers has improved.

“FileTrail’s RFID solution will allow us to pass on the benefits of better file management to our clients through faster service and lower overhead costs,” said Lichtner.

Learn more about FileTrail and its RFID tracking technology at www.filetrail.com, and learn more about Poyner Spruill LLP at www.poynerspruill.com. *



RFID sensors in cubicles and offices automatically track files as they move.