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Jody Rosenberg
 Director of Operations
 Sughrue Mion, PLLC

Case Study

Sughrue Mion, PLLC

IP Law firm gains control with FileTrail.

Client Profile

Headquarters: Washington, DC

Industry: Legal

The firm of Sughrue Mion, PLLC has protected new technology for its clients for over forty years and is one of the leading boutique IP firms. In 2005, the firm was ranked 4th among trademark firms, and 2nd in number of utility patents issued by *Intellectual Property Today* magazine. The file room, managed and operated by Océ Business Services, handles in excess of 1,200 files per day. Sughrue implemented FileTrail to improve file room operations and provide firm-wide access to locate and request files online.

FileTrail Implementation: 2005

FileTrail Products Implemented

- **FileTrail Professional** - Complete file tracking and records management automation.
- **FTColorLabel** - On-demand printing of color-coded folder labels.
- **FileTrail RFID** - Automated check-in, check-out and tracking using RFID technology.
- **RF-Mobile™** - Portable scanner application that allows files to be checked-in, checked-out, transferred and boxed without being tethered to a workstation.

<http://www.FileTrail.com>

Background

Sughrue Mion, PLLC is a leading IP law firm based in Washington, DC. In 2001, Sughrue had implemented a Windows-based system to automate file room operations and track 12,000 active files. Over the years, the firm's database had grown to 140,000 files, the number of employees was approaching 250, and the volume of activity was much larger.

Sughrue recognized a growing need for all staff to have on-line access to the file inventory, as well as a need for more robust automation of repetitive file handling tasks. The firm selected FileTrail in May of 2005 because of its process automation, intuitive browser-based interface, and experience with RFID.

Passive Tracking with RFID

In September 2008, the firm expanded their original FileTrail RFID solution to include passive tracking with Ethernet-based RFID. Files are automatically tracked as they enter and leave the New Applications, Formalities, and NGB departments. SmartSensors under each desk in SMT and Overflow automatically track files to the specification employee as they arrive at their desk.

“The addition of UHF RFID sensors in ceilings and cubicles at key locations has greatly improved our file tracking,” said Jody Rosenberg, Director of Operations.

Portable RFID Saves Time

IP files are so critical that Sughrue conducts an audit each week of the 5,000 to 6,000 files in 250 cubicles and offices. This process updates the current location of the files.

Prior to FileTrail, this process was completed by a team of staff on Sundays and took 32 man-hours to complete. With FileTrail RFID that same audit is completed in just a few



RFID SmartSensors automatically check out files as they arrive at each desk.



The portable RF-Mobile tracker reads tagged files from up to 20 feet away, streamlining audits and helping find misplaced files quickly.

Application Highlights

- FileTrail is integrated with the docketing system to automatically load new data and trigger printing of color-coded labels.
- FileTrail RFID File Tracking technology automates check-in, checkOut, and weekly firm-wide audits.
- Migration of all data from a Windows-based Opus32 system without disrupting the production environment.

Key Results

- **Firm-wide Access** - Everyone saves time by searching, locating and requesting files from their desks.
- **File Room Automation** - FileTrail streamlines file room operations with integrated workflow processes and RFID technology.
- **Easy Auditing** - Weekly audits can be done in one-fifth of the time using RFID.
- **Seamless Integration** - Real-time integration with the docket system keeps FileTrail up-to-date and triggers printing of labels for new matters.
- **Automated Labeling** - color-coded strip labels are printed from FileTrail, saving time over manual labeling methods.

hours. The process is so fast that audits are now done twice a week.

“The portable FileDetector has helped us locate critical files quickly — once when they were locked in a desk drawer where they could not be seen,” said Rosenberg.

One of the biggest time-savers is the Detector feature on the portable RFID reader. Files that cannot be found are flagged as “missing” in FileTrail. The list of missing files gets downloaded to the portable, along with any information about who is requesting the file.



The Missing Item alert notifies you when a missing file is detected.

An employee uses the portable to survey offices and cubicles. When a missing file is detected an audible alarm sounds and the file's description is displayed, along with who is waiting for it. This allows the file to be delivered quickly, without requiring a trip back to the file room to research what should be done with the file. The Move function is available from the Missing Item alert screen, allowing the file to be easily checked out to the person who needed the file.

Requesting Saves Time

Attorneys and secretaries save time with FileTrail's easy-to-use interface at their desks. Tools for searching and requesting eliminate the time that would be spent otherwise calling, emailing, or walking to the file room.

The process is very easy. The search screen guides staff in searching for the files they need. Staff select the service they need - these are configurable and may include services for delivery, will call, photocopy, faxing, etc. — and complete the request. The new requests appear to staff in the file room, where pull lists, delivery lists and other tools ensure fast delivery.

“The ease of requesting files has had the biggest impact in terms of saving time for our firm,” said Rosenberg. “The staff would not use our old system for requesting, but FileTrail is remarkably clear and easy to use.”

Support Tools Save Time

Legal Secretaries generally face the task of doing all file management for a group of attorneys. Files may be checked out to the attorney or the secretary. And, secretaries must transfer files between their attorneys and other staff, as well as receive transfers from other attorneys and staff. The admin support tools in FileTrail make these tasks fast and easy.

“The secretaries love the admin support tools in FileTrail,” said Rosenberg. “For the first time, they can see what is checked out to their attorneys, manage those files, request files in their name, and do file transfers for them.”

Saving Time with RFID

RFID technology adds a new level of intelligence to the filing system. Like barcodes, RFID tags provide a unique identifier for each file. However, RFID allows tasks like batch check-in and check-out to be performed many times faster than with barcode scanning.

“The intelligent file system has dramatically reduced the hours of costly and inefficient time formerly devoted to file management,” said Tommy Sanders of Océ Business Systems, Senior Site Manager at Sughrue.

“FileTrail's experience in RFID really shows in the product design,” said Chris Kempf, of the Information Technology department.

About FileTrail

FileTrail, Inc., is the leading provider of browser-based records management solutions. Companies of all sizes turn to FileTrail to streamline processes with the latest technology and most configurable software. Headquartered in San Jose, California, FileTrail has been providing solutions for records management since 2001.

Access to Information Benefits Staff

Access to file information through FileTrail has helped in many ways. First, the ability to login at every desktop empowers staff to make quick decisions and get things done faster. Knowing what exists and where it actually is, helps them get the files they need faster. Rather than making broad requests to the file room for materials they need, requests are for explicitly-identified items they have found in FileTrail.

Also, because the current location is shown, staff often have a more efficient option than making a request to the file room. When a file is already checked out, they can get the file much more directly and quickly by contacting that person.

“Our staff love that FileTrail gives them a one-click email to the person who has the file they need,” said Rosenberg. “When you see that a file that you need is checked out, you can click on the email icon beside their name and FileTrail formulates an email for you instantly, without typing.”

Integration Eliminates Data Entry

A critical success factor for the project was to avoid performing data entry in FileTrail. FileTrail staff worked with technical staff from Sughrue to provide real-time integration with the firm’s docketing system.

“A new folder is automatically generated in FileTrail as soon as a new Matter is opened in our docketing system,” said Rosenberg.

Conclusion

The key benefits of FileTrail are clear. Easy-to-use browser-based software provides time-saving tools to attorneys and staff, while RFID technology speeds processing and automates tracking of files. Additional FileTrail features for administrative support and archiving also save time and increase control over files.

“FileTrail was a leap forward for the firm in terms of automated file tracking and RFID technology,” said Rosenberg.

Contact FileTrail Today!

For more information about the benefits of automating with FileTrail, call your local FileTrail representative at:

FILETRAIL®

<http://www.FileTrail.com>

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