

CASESTUDY





instant access

Seeking to achieve more unified and efficient operations, Canadian firm Gowling Lafleur Henderson LLP searched for an ideal records management solution – and found one from FileTrail that employs RFID information tracking technology.

BY JASON MERVYN AND TOM PEMBERTON

The 2,000 lawyers and staff at Gowling Lafleur Henderson LLP (Gowlings) use an Intranet portal called REx Online to manage client matters. REx Online was developed internally to provide a matter-centric practice management platform that integrates document management, time and billing, matter management, and more.

The most recent addition was integration with a Radio Frequency Identification (RFID) Tracking Solution from FileTrail™ to provide lawyers and staff with instant access to information about physical records. Without leaving their desks, lawyers and staff can determine what exists, where it is located, and can even request delivery.

COMPLETE PRACTICE MANAGEMENT

Gowlings began developing REx Online in 2001, following the implementation of a new time and billing system. Initially, it was developed so the firm could provide timely access to matter-centric financial information. Since its initial implementation, critical information from third party systems (including OpenText™, ADERANT™, and FileTrail) has been integrated into the REx Online interface.

Today, the selection of any matter provides users with access to financials, electronic documents, due dates, reminders, and physical records.

The initiative continues to provide great returns for the firm. From a financial perspective, REx Online leverages the firm's technology investments in its core systems. From an operational perspective, REx Online saves time by organizing data, simplifying collaboration, and providing easy access to information.

BACKGROUND

In late 2006, the firm began looking for a physical records management solution. At that time, the firm recognized the great value that REx Online provided, but also acknowledged the challenges it faced relative to physical records.

The first issue with physical records was a lack of standards. Over the years, procedures had developed organically in each of the firm's seven Canadian offices. As a result, the firm had seven different ways of collecting, storing, and retrieving data. Lack of a central database system for indexing physical records meant that quality of the data varied greatly between offices, and even within an office from year to year.

Other issues that were observed included inconsistent tracking, inability to conduct reliable audits, lost files, and the inability to effectively search and retrieve physical records when needed.

SELECTION PROCESS

The firm developed a list of key requirements so it could effectively evaluate vendors and solutions for physical records management. These included:

- browser-based,
- ability to integrate with REx Online using Web services,
- support for multi-office architecture and accommodation for differences between small and large offices,
- leverage of RFID technology to automate tracking, and
- experience in the legal industry.

"In our search for a records management solution, it was critical for Gowlings to find a company whose vision and solution aligned

with our wish to leverage existing investments, and could take us to the next step in tracking technology," said Jason Mervyn, Director of IT Business Solutions.

Through the selection process, the firm gained an understanding of RFID technology and the differences between high-frequency (HF) and ultra-high-frequency (UHF) technologies. Ultimately, it became clear that RFID would be important because of its industry adoption (and as a replacement for traditional bar coding).

SELECTING FILETRAIL

After evaluating several vendors and systems, the firm selected FileTrail, thanks to several key factors:

- **Cost:** FileTrail's costs were not as high as large-company solutions.
- **Integration:** FileTrail's web services and frameable pages allowed full integration with REx Online.
- **Platform:** FileTrail is browser-based, even for file room staff and administrators.
- **RFID:** FileTrail has proven large-scale UHF RFID installations.
- **Market:** FileTrail has significant experience in the legal industry.
- **Quality:** FileTrail's software has a well-designed interface and intuitive processes.
- **Credibility:** FileTrail provided great references from clients.
- **Configurable:** FileTrail has unlimited user-defined fields for each type of record.

"With FileTrail, we have found a vendor that took the time to understand our vision, a product that was easy to integrate with our industry-leading practice management system (REx Online), and a partner to guide us into RFID tracking technology," said Mervyn.

RESULTS

Gowlings began implementing FileTrail in western Canada. Since implementing FileTrail and integrating physical records into REx Online, the firm has seen positive results, among them:

- **Integrated index and requesting:** The new Records Management tab in REx allows users to see what exists and where it is. In offices

that provide delivery services, users may place requests for retrieval. Prior to this, no information on physical records was available at the desktop, and retrieval required walking to the file room.

Figure 1: Physical records data from FileTrail appear in the REX Online screen. From this screen, users may also request delivery, view details, or view the location history.



- **Self-checkout with security badge:** In open file rooms, lawyers and staff simply present their security badges at a kiosk workstation, and all the files they are carrying are read by RFID. Checkout is automatic, without the need for keyboard or mouse, ensuring high user adoption. Prior to this, checkout procedures (if they existed) were paper-based, and compliance was virtually non-existent.

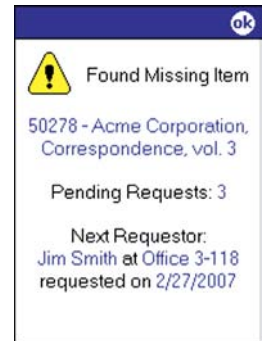
Figure 2: The Check-Out Station automates check-out by reading all the files you are carrying once your security badge has been read.



- **Finding critical files with the FileDetector™:** The 8-foot read range makes it easy to find files that are needed urgently. An audible alert and description on the screen help to route the file where it needs to go. Expanding beyond the file rooms, all offices or cubicles will be searchable in under a minute without touching or moving the files.

Figure 3 (below): FileDetector makes it easy to find files that are needed urgently.

- **Records management automation:** The FileTrail software includes many tools to automate the full records lifecycle from creation through disposition. Best practices are applied through some of these tools, including data integration, label printing, check-in and check-out, boxing records for storage, and more. Prior to this, every office had its own organically evolved processes. Yet, the firm can still accommodate the differences between offices in terms of practices, staffing, and labeling.



- **Passive tracking with RFID:** One of the reasons that Gowlings selected FileTrail was the SmartOffice™ technology, which may be implemented in coming years. 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.

“FileTrail is user-friendly and the system is laid out very well. The day-to-day tasks were very easy to learn,” said one staff member in Calgary. “Now that the system is in full use, I really see how the benefits have affected everyone.”

A SOUND PARTNERSHIP

FileTrail has provided a sound solution upon which Gowlings continues to expand its records management initiative. FileTrail’s ability to

WHAT THEY'RE SAYING AT GOWLING LAFLEUR HENDERSON LLP



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- Jason Mervyn
DIRECTOR OF IT BUSINESS SOLUTIONS



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- Joe MacDonald
SYSTEMS ANALYST

integrate with the existing platform has provided great returns with little training. As more information is exposed to users through REx Online, Gowlings will see continued savings as fewer files are misplaced and far less time is spent looking for physical records.

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about the authors

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>> More On Technology This Summer

The June/July issue of *Legal Management* features a Technology theme. Be sure to read about the following topics that impact your firm:

- > Records management
- > E-discovery trends
- > Software solutions
- > and more!



Hosting Creates Economical RFID Solutions

Many law firms are looking to Radio Frequency Identification (RFID) technology to substantially reduce the high costs of locating and delivering physical records. A combination of technologies – RFID and the hosted solution – have created the perfect storm, and now firms can get the benefits of RFID at far lower costs than previously possible.

RFID has become the hottest technology for tracking since the advances in ultra-high-frequency (UHF) three years ago. While law firms have been implementing RFID for tracking physical records since 2002, it was UHF that made it practical for the larger market. UHF tags are less than half the cost of HF tags and read from 20 times as far.

The new capabilities of UHF RFID allow placement of sensors at doorways and desktops to automatically track files. The first law firm known to use RFID for file tracking – Washington D.C.-based Sughrue Mion PLLC – upgraded its RFID from high frequency (HF) to UHF in 2008. As part of the transition, the firm deployed sensors in the ceiling and under desks at key locations to passively track files as they move.

“The addition of UHF RFID sensors in ceilings and cubicles at key locations has greatly improved our file tracking,” said Jody Rosenberg, the firm’s Director of Operations. “Also, the portable FileDetector has helped us to locate critical files quickly – once when they were locked in a desk drawer where they could not be seen.”

While the new capabilities of UHF RFID are fantastic, they are not suitable for all firms. Projects get expensive when you start adding a lot of hardware. For most firms, the cost of hardware is prohibitive. However, a basic RFID Tracking Kit uses the minimal hardware and delivers big results with an initial investment of less than one annual salary. The initial investment is reduced by another 67 percent when provided as a hosted solution.

The hosted solution is the newest movement sweeping the field of business software. Often referred to as “software as a service,” it is a model of delivering software over the Internet, eliminating the

need for firms to buy, build, manage, and maintain infrastructure and applications. Firms gain the benefits of the software, but with less capital investment, lower overhead, faster return on investment, and less risk. “Having FileTrail host the system on their servers was a great decision,” said Stephen P. Paschall, a Partner with Pittsburgh-based Lovett Bookman Harmon Marks LLP. “Since we started in 2003, we have never had to worry about doing backups, upgrading software, or installing software at anyone’s desk.”

A hosted RFID Tracking Kit delivers a complete records management solution for physical records. This includes the software for file tracking, label printing, import, and archiving. RFID technology is implemented with UHF RFID Tags and the portable RFID handheld that is used for tracking, auditing, and finding critical files with the FileDetector.

“The RFID FileDetector is the answer to our prayers,” said Nancy Rister, County Clerk of Williamson County, Texas. “The FileDetector sees files from more than 6 feet away. We can sweep courtrooms and cubicles and find the critical case files much more quickly than before.” ✱

