

“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 and a partner to guide us into RFID tracking technology.”

Jason Mervyn

Director of IT Business Solutions
Gowling Lafleur Henderson LLP

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Unified Practice Management With RFID in The Law Firm

Client Profile

Headquarters: Toronto, Ontario, Canada

Industry: Legal

FileTrail Implementation: 2008

FileTrail Products Implemented

- **FileTrail Professional** - Complete file tracking and records management automation with RFID technology.
- **FTIntegrate™** - Web Services and integration tools that provide physical records information to external systems and allow launching of FileTrail transactions.
- **RFEnterprise™** - Middleware that manages **PassiveTracking™** - automatic tracking of file locations without the need for staff compliance.
- **FTSynchronize™** - Scheduled synchronization of case data with the case management system.
- **RFMobile™** - The portable RFID reader conducts fast audits and hunts for critical files with the FileDetector.
- **FTAuthenticate** - Single sign-on authentication using Windows, Active Directory, or 3rd-party authentication.

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<http://www.FileTrail.com>

Introduction

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 an 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 development of REx Online in 2001, following the implementation of a new time and billing system. Initially, it was developed to meet the firm's wish to 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.

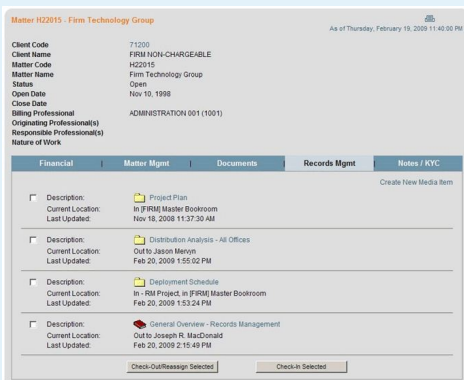
The first issue with physical records was a lack of standards. Over the years, procedures had developed organically in each of the seven Canadian offices. As a result, the firm had seven different ways of collecting, storing and retrieving data. Lack of a central database system for indexing physical 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.

About Gowlings

Gowlings is a leading Canadian law firm offering a diverse range of services to help domestic and international organizations achieve their business objectives. Recognized for excellence in business, advocacy and intellectual property law, Gowlings provides dedicated industry expertise in a number of sectors including energy, infrastructure, life sciences, financial services, technology and manufacturing. The firm combines traditional legal services with innovative solutions in areas such as transfer pricing and tax, government relations and occupational health and safety, to provide business entities with a competitive advantage. Characterized by national strength and regional focus, Gowlings has 750 professionals across offices in Montréal, Ottawa, Toronto, Hamilton, Waterloo Region, Calgary and Vancouver. The firm also provides intellectual property services in Russia and the CIS through its office in Moscow and provides strategic global advice to energy, resource and infrastructure clients from its office in London, England.

Visit us at www.gowlings.com.



The screenshot shows a web interface for FileTrail. At the top, it displays 'Matter H22015 - Firm Technology Group' and the date 'As of Thursday, February 19, 2009 11:40:50 PM'. Below this is a metadata section with fields for Client Code (71200), Client Name (FRM NON-CHARGEABLE), Matter Code (H22015), Matter Name (Firm Technology Group), Status (Open), Open Date (Nov 19, 1998), Close Date, Billing Professional (ADMINISTRATION 001 (1001)), and Responsible Professionals. A navigation bar includes 'Financial', 'Matter Mgmt', 'Documents', 'Records Mgmt', and 'Notes / KYC'. The main content area lists records with columns for Description, Current Location, and Last Updated. Four records are visible: 'Project Plan' (Nov 18, 2008 11:37:30 AM), 'Distribution Analysis - All Offices' (Feb 20, 2009 1:55:02 PM), 'Deployment Schedule' (Feb 20, 2009 1:55:24 PM), and 'General Overview - Records Management' (Feb 20, 2009 2:15:49 PM). At the bottom, there are buttons for 'Check-Out/Reassign Selected' and 'Check-In Selected'.

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



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

Selection Process

The firm developed a list of key requirements with which to 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 RFID technology to automate tracking
- Experience in the legal industry

"In our search for an RM 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 HF and UHF technologies. In the end, 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. The key factors that made FileTrail stand out included:

- **Cost:** FileTrail's costs were not as high as large company solutions.
- **Integration:** FileTrail's web services and framable 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.
- **Legal:** 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 the Implementation of FileTrail in Western Canada. Since implementing FileTrail and integrating physical records into REX Online, the firm has seen positive results.

- **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 a request for retrieval. Prior to this no information on physical records was available at the desktop and retrieval required walking to the file room. (See figure 1 at left)
- **Self-checkout with security badge:** In open file rooms, lawyers and staff simply present their security badge 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. (See figure 2 at left)

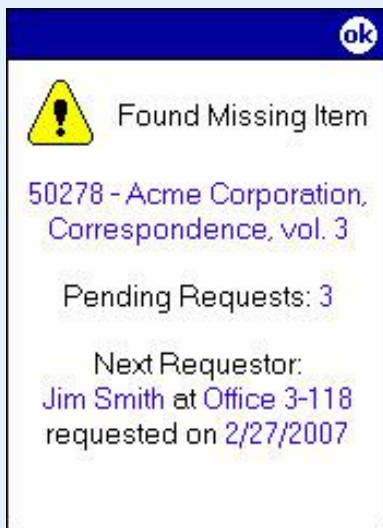


Figure 3 The FileDetector sounds an audible alert and presents information about the missing item it has found on the screen.

About FileTrail

FileTrail, Inc., is the leading provider of web-based business records automation, including file tracking and records management solutions. FileTrail helps organizations implement and enforce standardized processes in handling paperwork, documenting compliance, and managing workflow, providing a fast-track to “best practices”. With FileTrail your organization responds faster and more reliably to internal and external clients, contributing to higher customer retention that is important in today's economy. FileTrail is the leader in UHF RFID for records handling and tracking. FileTrail's RFID technology brings additional time-savings to managing paperwork including passive tracking, securing exits, and locating critical files using the FileDetector™. FileTrail's clients span over forty industries on four continents. Based in San Jose, California, FileTrail has been providing solutions for records management since 2001. Visit us at www.FileTrail.com.

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Results (cont.)

- **Finding critical files with the FileDetector™:** The 8-foot read range makes it easy to file files that are needed critically. An audible alert and description on the screen helps route the file where it needs to go. As we expand beyond the file rooms, all offices or cubicles will be searchable in under a minute without touching or moving the files. (See figure 3 at left)
- **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, we can 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.”

Summary

FileTrail has provided a sound solution upon which Gowlings continues to expand its records management initiative. FileTrail's ability to integrate with the existing platform has provided great returns with little training. As more and more physical records 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.

“FileTrail, with its web services and web-based architecture, integrated nicely into our existing Intranet-based practice management platform,” said Joe MacDonald, Systems Analyst. “This was important because it minimized the training for lawyers and staff and increases our adoption rate.”



*This article was first published in the April, 2009, edition of Legal Management by ALA (Association of Legal Administrators). For more information about ALA, visit their website at www.alanet.org.

Contact FileTrail Today!

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

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