



Law Firm Case Study

RFID and Records Management

Frاندzel Robins Bloom & Csato, L.C.

F	R
B	C

30 YEARS
of SERVICE



Frاندzel Robins Bloom & Csato, L.C. provides specialized legal services for creditors rights and commercial litigation, bankruptcy and business reorganizations, real estate finance and transactions, business litigation and employment law. The firm maintains approximately 40,000 file folder records, with documents housed in top tab manila (subject matter) 'child folders' that are stored within side tab redweld 'master folders'. Files are decentralized throughout two floors in open shelf and lateral filing cabinets, with all staff having access to, pulling and refiling records and documents.

Problem

Because files are decentralized and handled by all staff directly, without check IN or check OUT procedures, it was very difficult to find needed once in circulation. Compounding the difficulties, files frequently move from person-to-person and office-to-office, and inordinate staff time was routinely required to find needed records. The firm was losing critical staff productivity and losing billable time based on the inability to access needed files in a timely manner.

Solution

Implemented SmartTraxx RFID File Tracking System from Virtual Doxx Corporation.

- Integrated SmartTraxx with ELITE host system
- 3-layer database including abstract Client / Matter #'s, Master folders and sub-folders
- RFID antennas along hallways track all files real-time as they travel around facilities
- Portable Scanner is utilized for pinpoint inventories of file locations and to FIND missing files

Optimized Records Management through Best Practices, Technology and Innovation

Manage File Movements throughout a Facility

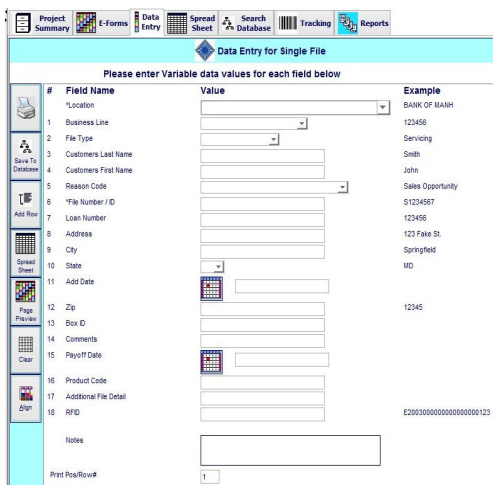
Hallway RFID Detection Zones



Portable RFID/Bar Code Scanner



Records Management Software



The screenshot shows the SmartTraxx software interface. At the top, there are tabs for Project Summary, E-Forms, Data Entry, Spread Sheet, Search Database, Tracking, and Reports. The main window is titled 'Data Entry for Single File' and contains a form with the following fields:

#	Field Name	Value	Example
1	Business Line		BANK OF MAINE
2	File Type		123456
3	Customers Last Name		Servicing
4	Customers First Name		Smith
5	Reason Code		John
6	*File Number / ID		S1234567
7	Loan Number		123456
8	Address		123 Fake St.
9	City		Springfield
10	State		MO
11	Add Date		
12	Zip		12345
13	Box ID		
14	Comments		
15	Payoff Date		
16	Product Code		
17	Additional File Detail		
18	RFID		E2003000000000000000000123
Notes			
Print Pos/Row#		1	

New clients and new matters are added to the Elite case management system throughout daily operations. All new records import to SmartTraxx on a nightly basis, and the records requiring physical side tab or top tab labels are automatically queued for RFID label printing to originate folders.



RFID Technology

Once labeled with side tab (redweld) and top tab (manila) RFID labels, files are tracked real-time throughout the two floors of operations by 14 RFID detection zones installed along hallways and at elevators and stairwells. Antennas are mounted about ceiling tiles for aesthetic purposes and track files wherever and whenever they travel, with the database showing the exact zone within which a needed file is located.

A portable RFID scanner is utilized to periodically update the database with exact, versus zone, locations of files. Detection zones and portable scanner inventories enable staff to query the database to determine the exact location of a file at that exact moment. On occasions where files cannot be located, the scanner functions similar to a metal detector to guide staff to within a few inches of a needed file.

Records Management Software

SmartTraxx provides Frandzel with total records management functionality, including:

- Client-Matter management
- File tracking
- Retention scheduling and archiving
- Workflow and Queue management
- Unlimited reporting



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