

The original All-in-One®
Software Suite for
Case and Financial Management

Front Office Product Sheet



RMS - Records Management System (w/barcode scanning)

Product Features

- Users can create file folder labels one folder at a time or in a set
- Files can be quickly checked in or out with or without the use of a barcode scanner
- Each file has a permanent or home location with an assigned location if it is checked out
- Audit trail reports provide information on which users are making the entries into the system
- File folder status indicates if the file is open, closed, archived, or destroyed
- Lifecycle scheduling rules manage retention, archival, disposition and destruction



PERFECTLAW®
ALL-IN-ONE® SOFTWARE

www.perfectlaw.com
1.800.749.6200

In the age of electronic document management and imaging, physical files are still used by many firms. The cost of misplacing or misfiling the paper file in terms of time, client relations, and even liability, can be astronomical. PerfectLaw® provides a Records Management System (RMS) as part of its All-in-One® Software suite to provide you with the tools to minimize – if not eliminate – these risks.

PerfectLaw® RMS manages every phase of the paper-flow process throughout the entire lifecycle of a pending matter. Its database tools allow any authorized user to track, not just the physical location of every file folder, but its every move: who has it and where, and how long they have had it.

Benefits

- RMS allows you to minimize the problem of lost or misplaced files and ensures checkout and file location accuracy with customizable barcode folder labels and handheld barcode scanning
- Lifecycle file management both schedules and enforces faster final file disposition, reducing the amount of on-site and off-site physical storage required
- RMS supports a rules engine for lifecycle retention – which can be tailored to each practice area and folder type – that allows you to manage and dispose of physical files faster
- When combined with PerfectLaw® Document Management System (DMS) and the Paperless Workflow® imaging system, document profile records are not only linked to the online image of a document, but they also tell you which folder holds the original physical document, the folder's permanent location, and where that folder is now; these features also allow you to quickly and easily replace lost files

Functions

- File folder labels are printed with barcodes that correspond to the matter and folder ID
- Folder labels can show client name, matter name, folder name, area of law, responsible attorney, filing or open date, or any other matter or folder attribute desired
- RMS database can be easily searched to find the location and user assigned to any folder
- Circulation history is tracked as folders move throughout the firm
- Each movement is an RMS transaction where the TO/FROM information is entered manually or by barcode scanning
- Check-in/check-out files between permanent or temporary locations known to the RMS
- Wait lists can be produced and e-mailed to the person currently in possession of a file if the file is requested elsewhere
- Periodic “sweeps” of known RMS locations, file drawers, offices, and boxes help find misplaced files by updating the RMS database with each folder’s current location; if a folder is on a “lost” list, it can be returned to its permanent location

Date	Location	Who	Status
8/20/2001	E%BKAO	BKA	Review
9/15/2001	E%CAB3	BKA	Returned
3/20/2006	E%BWB0	BWB	Review
4/3/2006	E%CAB3	BWB	Returned

Circulation history - as a matter folder circulates throughout the firm it moves and gets assigned from one location and user to the next. Each movement is an RMS transaction where the TO/FROM information is entered manually or by barcode scanning.

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Corporate Headquarters
PerfectLaw[®] Software
6100 Blue Lagoon Drive
Suite 350
Miami, Florida 33126

Phone: 800.749.6200
Email: info@perfectlaw.com
Web: www.perfectlaw.com