

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

Front Office Product Sheet 

RMS - Records Management System (w/hierarchy support)

Product Features

- Labels can be printed one at a time or as a set to manage items of boxes, folders, and inserts
- Check-in/out via screen selection is quick and easy without the barcode scanner option
- Each managed item has a permanent or home location and an assigned location if it is checked out
- Paper inserts contained in folders linked to the online digital images support reprinting of lost documents and viewing them even when they are checked out by someone
- Audit trail reports show who edited or added each record
- The status of managed items indicates if the file is open, checked out, closed, archived, or destroyed
- Lifecycle scheduling rules can be setup to schedule retention, archival, disposition and destruction

In the age of electronic document management and imaging, paper documents and physical files are still in use everywhere for statutory compliance and backup. The cost of misplacing or misfiling the paperwork in terms of time, client relations, and liability, can be astronomical. So, PerfectLaw® provides a Records Management System (RMS) as part of its All-in-One® Software suite with tools to minimize – if not eliminate – these costs and risks.

PerfectLaw® RMS manages every phase of the paper-flow process over the lifecycle of each matter. Its database tools allow any authorized user to track, not just the physical location of every file folder, but every event in its circulation history, i.e. who had it where, and for how long.

Benefits

- RMS minimizes the cost and time wasted due to lost or misplaced files and ensures checkout and file location accuracy
- Lifecycle box, folder, and insert management enforces faster final file disposition, reducing the need for on-site and off-site physical storage
- When RMS paper documents are linked to documents profiled in the PerfectLaw® Document Management System (DMS), they can be easily viewed on-line, checked out, tracked and reprinted if necessary

Functions

- Manage boxes, folder, and insert items in a hierarchy
- Print item labels with or without barcodes with client name, matter name, folder name, area of law, responsible attorney, filing or open date, or any other matter or folder attribute desired
- Search to find the location and/or user assigned to any managed item including boxes, folders, or insert

PERFECTLAW®
ALL-IN-ONE® SOFTWARE

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1 . 8 0 0 . 7 4 9 . 6 2 0 0

- Track item circulation history as items move through the firm
- Check-in/out items to users and locations
- Lifecycle and retention scheduling via the PerfectLaw® workflow rules engine – which can be tailored to each practice area and item type
- Paper documents contained in RMS folders can be linked to online digital images when RMS is combined with PerfectLaw® DMS.
- Waiting lists can be produced and e-mailed to the person currently in possession of an item if the file is requested or required elsewhere
- Barcode option only: periodic “sweeps” of locations, file drawers, offices, and boxes help find misplaced files by updating the RMS database with each item’s current location; if an item is on a “lost” list, it can be returned to its permanent location

Editing Records Management-100/84779

Edit Help

Folder Tracking Notes

Folder No. 02 Folder Name Contracts

Home Location Cabinet 3 ...

Status Open ...

Last Sweep 4/3/2006 ...

OK Cancel

Date	Location	Who	Status
8/20/2001	E%BKA0	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 an item (boxes, folders, and inserts) 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 item is Checked Out or Checked In. Each movement is then recorded in the History tab for the selected folder.

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