

“Our files are crucial, and knowing where they are at all times is important.”

Vice President of Information Technology
IT Leasing Company

Case Study

IT Leasing Company

IT leasing company's legal department gains control with FileTrail.

Client Profile

Headquarters: St. Louis, MO

Industry: Leasing

The client is one of the largest independent IT leasing specialists in the world, operating more than 30 sales offices internationally for over 30 years. They have maintained a reputation second-to-none for dependability, excellent service and quick response to customer requests. The legal department implemented FileTrail to manage its more than 13,000 agreements and contract files.

FileTrail Implementation: 2004

FileTrail Products Implemented

- **FileTrail Professional** - Complete file tracking and records management automation.
- **FTMobile™** - The software allows files to be checked-in, checked-out, transferred and boxed without being tethered to a workstation.
- **FTSynchronize™** - Loads and updates data from upstream resources to keep FileTrail data synchronized and up-to-date with authoritative systems.
- **FTColorLabel** - On-demand printing of color-coded folder labels.

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<http://www.FileTrail.com>

Background

Managing files effectively is an essential function of any business, especially for contract files in a legal department. One of the largest independent IT leasing specialists in the world, this client has more than 30 offices in the US, Canada, Mexico, Brazil, Central America, Germany and the UK.

The legal department has the responsibility of tracking 13,000 files representing purchase agreements, leasing contracts and other key documentation. With FileTrail, employees can retrieve records from the file room more quickly, easily and efficiently than they could in the past. In addition, label printing, file creation and archiving processes have all been streamlined.

Eliminating the Paper Chase

The file room in the legal department is open and available to all employees needing files. Before FileTrail was put into place, most employees would walk down to the stacks and pull their own files. Others would call or email the file room supervisor to pull their files. The check-out process was a very manual process.

“Someone would have to complete a check-out card, write a description of the contract being checked out, put the user's name on it and slide it in the space where the folder used to be,” the file room supervisor explained.

Now with the FileTrail system, staff can request files electronically while sitting at their desks. Staff know immediately if a file is available and this has eliminated the frustration of walking down to the file room only to find that someone else has already checked out the file that is needed.

Improving Control

“Having FileTrail allows the file room supervisor to maintain better control over records after they leave the file room,” said the systems analyst. “Now, there are fewer lost files.”

FileTrail leaves a very visible trail, which encourages users to keep records moving, instead of letting them sit idly on their desk.

“Anyone can log on and see who has a file on their desk,” said the corporate attorney. “You can't just let it sit on your desk for weeks and months because you don't feel like walking to the file room.”

Application Highlights

- Data resides on an MS SQL Server 2000 database on a server located at the corporate headquarters and is accessible by all staff in the legal department, right from their desks.
- FileTrail's security controls what functions staff can use and who can view, add or edit data.

Key Results

- **Time Saved** - Access to records information at the desktop eliminated unnecessary trips to the file room, as staff know immediately if a file is available.
- **Increased Accountability** - The ability for anyone to see who has a file increases accountability for files, reducing file loss and increasing compliance with best practices.
- **Automated Labeling** - The process of creating files was streamlined to save labor. Staff print a single strip label that contains color codes, text and a bar code.
- **Easy Configurability** - Screens, search forms and labels were easily configured to reflect the data and terminology that staff use to describe each type of agreement, contract and file folder.

Customer Insight

Because staff can search and request files while sitting at their desks, they know immediately if a file is available, eliminating wasted time walking to the file room for a file that has already been checked out.

Having the ability to assign icons to represent the different types of files, makes it easy for staff. It reminds those that are creating new files what type or color of folder to use.

About FileTrail

FileTrail, Inc., is the leading provider of browser-based records management solutions. Companies of all sizes turn to FileTrail to streamline processes with the latest technology and most configurable software. Headquartered in San Jose, California, FileTrail has been providing solutions for records management since 2001.

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Creating a Custom Fit

Staff members are happy with FileTrail and find it very easy to use. Part of the reason for their satisfaction is the configuration that was done during implementation. FileTrail is built to adapt without the need for additional programming and was configured specifically to the department's needs.

"Within the first couple of weeks, we made a lot of changes," the business analyst said. "We changed the order of fields and display results. We were able to assign icons to each type of file that showed what they actually looked like."

Staff weren't limited to hard-coded designations in FileTrail. Instead, they were able to describe files according to the type of contract, such as master lease and equipment schedules.

An Easy Solution

The consensus among attorneys and staff is that FileTrail saves them time and is very intuitive and user-friendly.

"It follows the way people move around the screen," on staffer reported. "People don't have to figure out what anything means. It's very comfortable to work with."

Solution Summary

FileTrail Professional - Provides an integrated platform for all staff to search, locate and request files. Powerful file room tools simplify filing and retrieving tasks. Security tools control who can view, add, or update records.

Color-coding - Automated color-coding prints color codes, a bar code and text on a single label. This simplifies file creation and saves up to 60% of labor.

FTMobile™ - Provides a user-friendly portable platform for remote activities. The integrated bar code scanner and FTMobile software allows files to be checked-in, checked-out and boxed without being tethered to a workstation.

FTSynchronize™ - Loads and updates data from upstream resources to keep FileTrail data synchronized and up-to-date with authoritative systems.



FileTrail FTMobile

Contact FileTrail Today!

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

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