

“With FileTrail, the records department has gained the trust of legal assistants. They feel confident letting go of files knowing they will be able to retrieve them again.”

Debrah McClaskey
Records Manager
Hovey Williams, LLP

Hovey Williams LLP

IP law firm gains control with FileTrail.

Client Profile

Headquarters: Overland Park, KS

Industry: Legal

Hovey Williams, LLP, is an Intellectual Property (IP) law firm focused on trademark, patent, copyright and trade secret law. The firm was founded by C. Earl Hovey and Roy Hamilton in 1929, just four weeks before the stock market crash. The ingenuity and resolve it took to launch a new business and survive during the Great Depression tempered the firm in the fundamentals of success. Today, with over 300 years of combined practice experience, the firm is dedicated to providing excellent value to its clients.

FileTrail Implementation: 2006

FileTrail Products Implemented

- **Professional On-Demand** - Software as a Service (SaaS) hosted by FileTrail that automates records management including tracking, searching, requesting, etc.
- **FTColorLabel** - On-demand printing of color-coded folder labels.
- **FTSynchronize** - Scheduled synchronization of data with an AS/400 system is automatic

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Background

After nearly 80 years of growth the firm of Hovey Williams, LLP, (Hovey) was facing growing risk and higher consumption of labor in file-handling processes. Tracking is important in an IP law firm because the files are very valuable and move a lot. Additionally, files are often critical to deadline-driven events. And when deadlines are missed, fines may be assessed.

One of the factors that created many of the problems was the lack of a central database for the inventory of file folders. Excel spreadsheets and manila folders were maintained by a few staff, who also created new folders manually. Without the central database keeping track of files, it was impossible and crucial time was being wasted.

“It was a mess before FileTrail,” said Debrah McClaskey, Records Manager. “I don't know how we ever managed without FileTrail.”

Bottom Line Savings

Hovey selected FileTrail after a review of several tracking products. Hovey liked how customizable FileTrail is and the ability of the FileTrail software to cater to the firm's exact requirements. FileTrail automated many processes that staff were performing manually, and eliminated the need for physical searches.

“Before a records management system was in place, legal assistants and paralegals would spend at least five hours of their week hunting for files,” said McClaskey. “This amounts to about \$90,000 per year in direct costs that FileTrail has saved us.”

Firm-Wide Access

Another key source of labor savings is the tools available through FileTrail at every desk. Before FileTrail, only a limited number of staff had access to the inventory of files in the Excel spreadsheets. Today, staff can quickly find out what files exist, where they are, and who else has handled them without ever leaving their desks.

“The fact that I can see who has a file without leaving my desk is extremely beneficial,” said Jean Kahrau, Legal Assistant.

Application Highlights

- The FileTrail application was rolled out to all staff instantly without installing software at the desktops.
- Color-coded labeling saves labor by simplifying filing and retrieval.
- Data automatically imported from the AS/400 Docketing system eliminates data entry and triggers creation of new folders.

Key Results

- **Automated File Tracking:** Labor is saved by keeping track of every file folder and giving all staff the ability to search and locate files from their desks.
- **Streamlined File Creation:** Creation of new files is triggered by data imported nightly from an AS/400 docketing system. Color-coded labels are quickly printed on a single strip label, dramatically reducing the labor to create a new file.
- **Control of Inactive Records:** Streamlining archiving and retrieval of folders and boxes in storage saves labor and eliminates manual management tasks.

Customer Insight

FileTrail was chosen for its fair price, configuration tools, and its user friendly program. Since the implementation in 2006 we have benefitted in a number of ways. Legal staff are able to search, identify, and retrieve files easily. With automated manual tasks and streamlining processes across the organization, we never have to worry about missing files again.

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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Synchronizing Data

FileTrail automatically synchronizes data with Hovey's AS/400 applications. This ensures that client and matter data appears in FileTrail with the exact same codes and names used throughout the firm.

In addition to standardization, the synchronization process triggers creation of new folders. This new centralized service is a more efficient process than the former decentralized approach. File room staff are notified of new folders to create. An automated process guides them through creation and labeling. The new color-coded folder labeling system eliminates mis-files and simplifies re-filing. Plus, the batch creation by file room staff saves a lot of time over individual creation by many staff.

"I no longer have to create my own files, which was very time-consuming," said Kahrau. "And they never looked as good as the files look now."

Controlling Archived Records

Managing the storage of old records can be almost as frustrating as tracking active files. Before FileTrail, detailed logs of folders in storage were kept manually and searching and retrieving from storage was equally manual.

Hovey now uses FileTrail processes to box files for storage and retrieve from storage. When staff are looking for a specific file, the box number and location of the box shows in the current location of the item.

"Offsite storage management has improved 500% with FileTrail," said McClaskey.

Facilitating Other Processes

"Before FileTrail there was no time to organize everything," said McClaskey. "We were always doing a manual inventory on missing files."

With FileTrail, so many of Hovey's business processes have changed.

- **The search tools save time for all staff.** The fundamental change is that staff don't spend so much time walking around. They have better and faster access to know what exists and where it is before they get up and start walking around.
- **FileTrail prevents files from being duplicated.** When files can't be found staff frequently create a 'dummy' or duplicate file. Prevention saves a lot of time, confusion, and potential error that comes from having duplicated files.
- **The location history is a very useful tool for the Records department.** Files are frequently passed to and from various people working on them, and it is sometimes important to see who worked on the file last month.
- **The Batch Update tool is very efficient.** It allows changes to descriptive data to be applied to many data records at once, rather than updating each individually.

Conclusion

FileTrail's easy-to use interface and flexibility caters to any firms' request. FileTrail offers solutions that make tracking files easy, efficient and secure. Misplaced files are eliminated, desktop tools allow staff to locate and retrieve files quickly.

"FileTrail is very user-friendly so it's easy to search for and request files. Having files delivered and picked up saves me roughly two hours a week of work," said Kanrau.

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

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