

“Awesome! My office is starting to have confidence again in a filing system!”

Lisa Pollice
Office Manager
Lovett Bookman Harmon Marks LLC

Case Study

Lovett Bookman Harmon Marks LLC

Law firm saves time with FileTrail.

Client Profile

Headquarters: Pittsburgh, PA

Industry: Legal

Lovett Bookman Harmon Marks LLP (LBHM) is a Pittsburgh-based law firm. A spin-off from a larger firm, LBHM is made up of 24 staff, including 11 attorneys and 6 legal secretaries. LBHM began operations in January 2003 and started using FileTrail in July 2003 to manage its active and inactive client records.

FileTrail Implementation: 2003

FileTrail Products Implemented

- **Professional On-Demand** - Software as a Service (SaaS) hosted by FileTrail that automates records management including tracking, searching, requesting, etc.
- **FTMini** - Low-cost portable bar code scanner that simplifies check-in, check-out, boxing for storage, and auditing.
- **FTConnect:RS-SQL** - Integrated XML connection to their commercial records center vendor to automate retrievals and transmittals.

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Background

FileTrail turned chaos into order for LBHM. The Pennsylvania law firm had just spun off from a larger firm and was struggling to find efficient ways to manage active and inactive client files.

“There were numerous times each week where three or four people, including attorneys, would spend at least an hour each looking for a file,” Office Manager, Lisa Pollice said. “Now, with FileTrail, it’s just a matter of a couple quick presses of a button, and you can locate any file. I really can’t imagine if we didn’t have a system like this.”

Eliminating Searches For Files

“Although LBHM is a small firm of just 24 staff, locating files was wasting a lot of time. But FileTrail serves as an essential gatekeeper for the firm,” Pollice said.

Bar codes provide a unique identity for each, supporting tracking of boxes, folders, or subfolders at any level. Each bar code ties the folder to descriptive data, current location, and history of the item in the database.

“It gives the firm the ability to effectively track files and locate files,” Pollice said. “For us, FileTrail is very beneficial, because a client may have 30 different folders, and inside each folder there may be five sub-parts.”

Simplifying Archiving

Implementing the FileTrail solution allowed the firm to move a huge quantity of client files to an offsite storage while still maintaining precise control over client folders.

“When we moved our practice into our new office, we had approximately 4,000 files,” partner Stephen Paschall recalled.

FileTrail integrates with the software used by Business Records Management Inc. (BRM), LBHM’s offsite storage vendor. This integration allows LBHM staff to place orders for pickup and retrieval from within FileTrail.

“Accessing offsite file folders is easy - it’s just a matter of pressing a button to order a file,” said Pollice.

Application Highlights

- The FileTrail application is hosted by FileTrail; both data and application reside at a secured data center.
- Integration with LBHM's offsite storage vendor, BRM, allows orders for pickup and retrieval of records to be placed with the click of a button.

Key Results

- **No Capital Expenditures** - Hosting the system with FileTrail avoided capital expenditures.
- **Streamlined Archiving and Retrieval** - Integration with the offsite storage vendor streamlines archiving and retrieval.
- **Easy Integration** - Configuration tools allow collection of the exact information needed by using familiar terms that the firm uses to describe client records.
- **Better Tracking System** - The use of bar codes streamlines tracking and archiving, and keeps the file locations up-to-date.
- **Firm-wide Access** - Desktop tools allow staff to search, locate, request and transfer files easily from their desk.

Customer Insight

Having FileTrail host the system on its servers was a great decision. Since we started in 2003, we have never had to worry about doing backups, upgrading software, or installing software at anyone's desk.

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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Handling Complex Client Files

The FileTrail software is easily configured to each client's needs. This allows LBHM to collect data to the level of detail that provides the most benefit.

"FileTrail gives us the ability to search and select the folders that have the right information," Paschall said. "We can find the folders we need quickly, limiting the number of folders we have to look through."

"It's typical for clients with 50-year relationships with the firm to have many files," Paschall said. "Being able to pinpoint the folders with the most appropriate information for client meetings is important."

Generating Bottom-Line Savings

FileTrail has helped LBHM gain control of its client files and standardize its filing system and filing practices. Above all, FileTrail is saving valuable staff time and resources by streamlining the file request, retrieval and transfer processes.

"The quantity and complexity of the organization of those files and the number of years those files cover, could have warranted having one dedicated person to keep track of those files," Paschall said. "FileTrail's automation has allowed us to spread that responsibility among all of our support staff with no line-item budgetary cost beyond what we pay for offsite storage and delivery."

In addition to labor savings, LBHM avoided capital expenditures for servers and server software by using a hosted solution. The application and data are hosted on FileTrail's servers. All management tasks, backups, upgrade, etc. are performed by FileTrail. The application is accessible at every desktop through Internet Explorer.

Another savings resulted from integration with offsite storage - integration with O'Neil Software's RS-SQL product streamlines interaction with BRM, the offsite storage vendor. The integration eliminates manual ordering processes and provides monitoring of pending orders. Orders automatically appear in the offsite storage vendor's order processing system.

"We are very pleased with FileTrail and would highly recommend it," Paschall commented.

Contact FileTrail Today!

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

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