



FileTrail - The Technology for Tracking

Workflow Management

Changing the way you manage information.

Product Features

- **Configurable Workflows:** Workflows are easily configured with any number of steps. And, multiple workflows can be configured for the same types of items to accommodate processes associated with intake (creation), disposition, and other activities. In each workflow you use your terminology for the name of the process and each task in the process.
- **Automated Triggering:** A workflow is easily triggered by creation or other processes in FileTrail. However, a workflow can also be triggered by an external event, such as completion of a project, funding of a loan, disposition of a case, or any other event that is reflected in external software systems.
- **Dashboard of Tasks:** Employees are alerted to pending tasks that need their attention. Powerful tools like Pull List and QuickMaps™ empower the employee to proactively retrieve and process paperwork, while Refile List, Batch Update, and Routing Instructions help them move paperwork forward in the process.

Keeping paperwork moving from person to person through routine steps is a huge challenge for every organization. There are no alerts when a file is falling behind target timelines, and delays in completion impact service levels and your reputation. Also, you have no idea which employees work effectively or where not having enough people is creating a bottleneck. Managing the process in a spreadsheet is time-consuming and provides few tools to help you manage.

FileTrail's Workflow Management module gives you real-time management tools, eliminates delays in processing, and ensures that your employees deliver timely results for clients. Each employee is alerted to tasks that are waiting for them. As tasks are marked complete they are automatically routed to the next step, eliminating delays between steps. Analytical reports help you make better decisions and respond quickly to trends and bottlenecks before they become critical.

What is Workflow?

A workflow is simply a routine path that information takes through a process. Each workflow involves several steps, and each step represents a task that an employee, or someone in group of employees, needs to complete. The risks in a workflow are that work may be delayed and fall behind the ideal timeline or completely fail to reach one of the steps.

The goal of the manager is to ensure that each unit of work completes the process in a timely manner, allowing the business to deliver results for its clients at a predictable pace. The challenges are knowing the metrics needed to make staffing and cross-training decisions to accommodate cycles in business volume.

Traditionally, workflow has been accomplished by staff walking around with paperwork. The FileTrail model performs automatic routing, alerting staff that there is work to do. In addition, FileTrail is not limited to paperwork-driven tasks, but drives performance of any type of task.

Ultimately, workflow is managed by collecting metrics that support management decisions. Collecting data in spreadsheets and database programs is time-consuming and falls short on automation. In contrast, FileTrail automates these tasks and allows complex workflows that span departments, floors of a building, and even cities, to be seen and monitored centrally.

FILETRAIL®
...because Paper Happens®

<http://www.FileTrail.com>

Product Features (continued)

- **Automating Routing:** Paperwork is automatically routed forward when employees complete their tasks. These appear in the dashboard of employees responsible for the next step.
- **Audit Trail:** Audit trail entries are automatically logged as workflow tasks are completed. The audit trail shows each task completed, who completed it, and when it was completed.
- **Workflow Monitoring:** Real-time monitoring of timeliness puts managers in touch with what is really happening. Summaries of open tasks, tasks coming due, and past due tasks help managers respond immediately to production problems.
- **Decision Support:** Reporting on productivity and volume of completed tasks provides the insight needed by management to make hiring/firing decisions, spot emerging bottlenecks before they become a problem, and evaluate cross-training.
- **Trending Analysis:** Daily, weekly, or monthly subtotals provide trending information that helps managers produce forecasts, anticipate operational problems, and plan for the addition of staff. Export to Excel provides quick access to powerful charting and graphing tools.

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.



<http://www.FileTrail.com>

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Product: Workflow Management

Powerful Results

FileTrail Workflow Management is easy to configure and use, yielding immediate and powerful results that:

- Ensures consistent execution of multi-step business processes.
- Drives business processes and monitors deadlines to help meet targets.
- Provides real-time metrics on workload, productivity and throughput.
- Shortens the critical path by minimizing “dead time” between process steps.
- Logs an audit trail of task completion to demonstrate process compliance.
- Applies roles and responsibilities to raise accountability.

Advanced Technology

One thing that makes FileTrail so successful is our advanced technology. A house is only as good as its foundation, so from the start, we crafted our architecture and technology to deliver these powerful results:

- **Browser-Based Technology:** FileTrail runs in any current browser, making it instantly accessible without installing software at every PC. Our enterprise-class security gives you complete control over who can login, view, request, add and edit data, or process workflow tasks.
- **Intuitive Interface:** FileTrail clients love the ease with which they learn and use the software. You save time and money because extensive training isn't necessary and new hires get it quickly. Our browser interface is as easy to use as amazon.com and other popular sites.
- **Hosted Service Option:** FileTrail can be installed on your server or run as a low-cost hosted service where the application and database are installed in our data center, with backups, upgrades and maintenance performed by our staff.
- **Live Integration:** Web services and browser technology place the power of FileTrail on your mission systems. Lists of items and their current location are easily retrieved and displayed on the screens your staff are already using. With only a few mouse clicks staff may request retrieval, view history, view related volumes, etc.
- **Configurability:** We configure your system to your needs before installation. You get all the configuration tools that make it easy for you to change and adjust your system without custom scripts or programming. You gain control with our unlimited classification system, unlimited number of user-defined fields, built-in label designer, and more.
- **Enterprise Scale:** More than just a departmental solution, FileTrail was architected to accommodate multiple locations. Powerful security limits access between locations, while providing standardization, centralized administration, and global oversight.

Contact FileTrail Today!

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

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