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Martin Wigert

File Manager
Hellmuth & Johnson

Hellmuth & Johnson, PLLC

Law Firm Gains Control of Client Files with FileTrail

Client Profile

Headquarters: Minneapolis, MN

Industry: Legal

Hellmuth & Johnson, PLLC provides a full suite of services to clients without sacrificing its original commitment to providing responsive and affordable representation. The firm’s legal practice focuses on civil representation, litigation and appeals. Clients span the spectrum from first-time home buyers to community associations, construction companies and international corporations. Since 2006, Hellmuth & Johnson has been recognized by Minnesota Law & Politics as one of the 50 largest law firms in the state, and in 2010, the firm was in the top 25 law firms in the state.

FileTrail Implementation: 2010

FileTrail Products Implemented

- **FileTrail Professional** - Complete file tracking and records management automation with RFID technology.
- **FTColorLabel™** - On-demand printing of color-coded folder labels.
- **SmartMobile™** - The portable RFID reader conducts fast audits and hunts for critical files with the Detector and Geiger Counter features, which allows files to be checked-in, checked-out, transferred and boxed without being tethered to a workstation.

FILETRAIL®

Background

Finding files had become stressful and time consuming for Hellmuth & Johnson. With no system for tracking files, it was not uncommon for employees to spend valuable time locating misplaced files.

Because of the continually growing volume of files, the firm sought out a new system for tracking and locating their files. In 2010, Hellmuth & Johnson implemented the FileTrail RFID solution. Once FileTrail was in place, employees were able to spend less time looking for files and more time on productive work.

“The law is not a forgiving line of work when it comes to missing deadlines,” said Martin Wigert, the firm’s File Manager. “We have had a few instances in the past when a file was misplaced and it was needed urgently; needless to say, that created some very stressful situations.”

Selecting a Solution

Hellmuth & Johnson conducted interviews with several vendors, FileTrail was selected because of its ability to meet the firm’s needs. The solution was not only cost-effective but the ease of use made searches easier and faster.

“FileTrail had the best hands-on implementation package and the best product to fit our needs,” commented Susan Marsh, the firm’s Chief Operating Officer.

There were many key factors contributing to the selection of FileTrail, including:

- **Cost:** FileTrail’s costs were not as high as other legal-industry solutions
- **RFID:** RFID automates tracking and helps locate lost files and FileTrail has proven large-scale UHF RFID installations



Application Highlights

- Color-coded labeling saves labor by simplifying filing and retrieval.
- Attorneys and staff are able to search, locate and request files from their desks.
- The number of volumes within each file can be easily viewed through the FileTrail application.

Key Results

- **Automated File Tracking:** Labor is saved by tracking every file folder and giving staff the ability to search and locate files.
- **Increased Accountability:** Location audit trails increase accountability for files and allow staff to look back through the file's location history.
- **Automated Labeling:** Color-coded labels are quickly and easily printed on a single strip label, dramatically reducing the labor used to create a new file.
- **Fast Audits:** The portable RFID reader allows for fast audits and quickly locates critical files with the Detector and Geiger Counter features..

Customer Insight

FileTrail was selected for its cost effective solutions, configurable tools, hands-on implementation and the helpful and knowledgeable staff. The implementation of the FileTrail solution has allowed legal staff to search, identify, and retrieve files easily. It's eliminated the many headaches that were often caused by spending valuable time searching for misplaced files. The knowledge of who has checked a file out has also proven immensely helpful in keeping track of a file's location. The portable RFID reader has also proven invaluable in finding files that have been misplaced.

- **Quality:** FileTrail's software has well-designed user interface and intuitive processes
- **Configurable:** FileTrail provides intuitive configuration tools that give clients the power to change their system as their needs change
- **Label Printing:** Barcode, color-coded and black & white labels can be printed to accommodate any label stock
- **Experience:** FileTrail has significant experience in the legal industry with firms of all sizes

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Eliminating Searches for Files

Prior to the implementation of FileTrail, finding files was a recurring problem. Staff would spend valuable time searching for files.

"We had no systematic file tracking method before implementing this system. So it was common to spend 20 minutes looking around for a folder with no guarantee of finding it. Now, with FileTrail anyone can log in and see where a folder is and how many volumes it has," commented Wigert.



The Detector features on the portable RFID SmartMobile allows staff to hunt for files like using a Geiger Counter.

"We can locate lost files quickly using our portable RFID reader," said Wigert.

Creating Files More Efficiently

FileTrail streamlined the creation of client files by automating labeling. Hellmuth & Johnson staff are able to print single strip labels containing all the text, color codes and a bar code. A single label with all the necessary information is efficient and saves plenty of time.



Facilitating Other Processes

"We chose to implement FileTrail because attorneys could ease into some of the features over time to make our searches even better," said Marsh.

The implementation of FileTrail has changed many of the business processes and capabilities, including:

- **The ability to view how many volumes a file has.** Hellmuth & Johnson has legal files containing many volumes. FileTrail allows staff to view how many volumes each file has without getting up from their desk.

About FileTrail

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

“Now, with FileTrail anyone can log in and see where a folder is and how many volumes it has. The knowledge of who checked a file out and when saves the firm money and headaches every day,” said Wigert.

- **The location history tool has proven very useful.** Being able to view who has checked a file out and when has helped to answer the questions.
- **The responsiveness of file room employees has increased.** File room staff have faster access to locate and retrieve files for attorneys and staff.

Good Implementation Experience

Implementing a new records management system was made simple and understandable with FileTrail’s interactive configuration process.

“After deciding to use FileTrail’s product, we were given an implementation guide that told us exactly the steps we would take. Each step was clearly outlined as to what our firm was responsible for and what FileTrail was responsible for, along with a schedule for completion,” said Wigert.

In addition to the ease of implementation, the ability to configure any number of user-defined fields for each type of record made the FileTrail solution the perfect fit for the firm.

“The FileTrail service feels very collaborative because of the encouragement to use the support site and the helpful answers that I receive through it. The FileTrail employees that have worked with Hellmuth & Johnson really make it feel like a one-to-one service,” comments Wigert.

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