

“FileTrail has helped us keep our efforts focused on delivering value for our clients while maximizing the revenue for the firm.”

Glenn M. Gelman
Principal, Managing Director
Glenn M. Gelman & Associates

Glenn M. Gelman & Associates

Public accounting firm implements FileTrail Hosted Solution to streamline work processes and save time and money.

Client Profile

Headquarters: Santa Ana, California

Industry: Accounting

The firm of Glenn M. Gelman & Associates, Certified Public Accountants and Business Consultants, was established in 1983. The firm serves hundreds of business and individual clients throughout Southern California, and is committed to providing superior accounting, tax, and business consulting services.

FileTrail Implementation: 2001

FileTrail Products Implemented

- **FileTrail Hosted Professional** - On-demand service for file tracking and records management.
- **FTColorLabel** - On-demand printing of color-coded folder labels.

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Background

Handling client files used to be more time-consuming for staff at the Santa Ana, California, firm of Glenn M. Gelman & Associates (Gelman). Gelman implemented FileTrail's records management application in 2001, and all staff including professional, clerical and administrative, have access to FileTrail to streamline their work and save time. Since implementing FileTrail, the staff spend less time on manual tasks and focus more on higher-value work for the firm and its clients.

Lost Files Cost Money

Before FileTrail, locating a file began with a trip to the file room. More than 25% of the time, the desired file was not available in the file room. If the file had already been checked out, then staff would retrieve the file from that person. If the file had been archived, then they faxed an order form to archives and came back to pick it up from the file room the next day.

For Gelman, the manual approach to locating files meant a lot of “walking payroll” or staff walking around looking for the file instead of producing billable work. The firm needed a better way to locate and retrieve their client files.

Now, staff save time by looking for the file from their desks. Then, they simply request the files that they need from the same screen. In the file room, an automated request fulfillment process helps ensure the files are pulled and available quickly.

FileTrail also simplifies dealing with files that are already checked out. Staff request it from the person who has the file, or simply walk over to get it. A simple transfer process reassigns the file, keeping the file's location information current and adding to the file's location audit trail.

Creating Files More Efficiently

Before FileTrail, staff had to fill out a form, send an email, or leave a voice mail about a new file they needed. Problems resulted from inaccuracy, illegible writing and incomplete information on the forms. This often became a conversational process requiring many emails and voice mails back and forth to complete what should have been a simple task.

FileTrail simplifies the process and saves a lot of time. Professional staff simply complete a validated form on the FileTrail screen without leaving their desks. Pulldown lists, a calendar tool, and required fields ensure that the form is filled out as completely and accurately as possible. This notifies the file room, prompting them to label and assemble the new folder, and deliver the file quickly.

“Staff enter the request for new files into FileTrail, reducing the amount of confusion and cross-checking of information,” said Crystal Max, the file room supervisor. “A big benefit is that client and project data is being collected directly from the people who will be searching for files later.”

Application Highlights

- The FileTrail application is hosted by FileTrail, Inc., with both data and application residing at FileTrail.
- Color-coded labels are printed quickly and easily from FileTrail.

Key Results

- **Low Capital Cost:** Gelman avoided expenditures for servers and server software by using a FileTrail hosted solution.
- **No More Lost Files:** Files are easily tracked using bar code technology.
- **Find Files Fast:** Professional staff locate files from their desks using FileTrail, saving valuable time.
- **Ad Hoc Reporting:** Professional staff can generate on-the-fly reports and file lists without technical training.
- **Fast Labeling:** File room staff save time printing color-coded file labels from FileTrail.

Customer Insight

We chose a hosted system from FileTrail in 2001 because budgeting kept us from implementing a system in-house. Once we made our decision, we were up and running in a very short period of time.

Pure Web technology is the key to keeping administration costs low. We have less than fifty staff, but installing a Windows application at every desktop would still have been a major pain. With FileTrail, all our staff had immediate access without any software installation at the desktops.

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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Automatic Labeling

Creating the labels for new folders used to be time-consuming. Like many firms, they typed text labels and applied color tabs to the end tab of the folder. Eventually, a stand-alone color labeling solution was implemented. It printed all text and color codes on a single label, but it required data entry onto its screen.

FileTrail streamlined label printing for Gelman's new folders (and even re-printing of damaged labels for old folders). A single strip label is printed with the text, color codes and a bar code. Best of all, there is no additional data entry. All the data for the label comes from the FileTrail database; this is the data originally entered by professional staff requesting the creation of the new file.

Eliminating Outcards

Checking out files used to be a manual task, when it was done. The checkout process involved manually completing an outcard. Because this was a time-consuming task most staff did not do it. As a result, many files were being removed from the file room without any record of where they went.

"FileTrail has eliminated the manual outcard process, saving a great deal of time and ensuring compliance with quick and easy bar code scanning," stated Marc Merrill, IT Manager.

Files are easily checked out by scanning a sequence of bar codes. First, scan the bar codes of all the files; then the bar code for the person, then the 'checkout' bar code - no need to use the mouse or keyboard. Check-in processes are even easier.

Streamlining Processes

FileTrail has streamlined so many other activities for Gelman. For example, archiving files, requesting a pickup, and ordering retrieval from their commercial records center has been greatly simplified.

"I can now click on a button to email our off-site record storage in a matter of seconds," said Max. "Instead of looking up all the details and filling out a form, the required information is already formatted for me by FileTrail."

FileTrail also streamlines other work. Professional staff can generate ad hoc reports from search results in FileTrail, instead of using manual processes. A download to Excel provides the raw data for those who want to do additional calculations or charting.

A Happy Conclusion

Thanks to the 100% Pure Web technology and professional staff, implementing the FileTrail solution was pretty easy. The Hosted Solution made file tracking and records management automation economical for the firm.

"We having been working with FileTrail since 2001. When searching for a solution the team at FileTrail was prompt, knowledgeable and above all professional in meeting our hosting needs," said Merrill.

Contact FileTrail Today!

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

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