

“The configurability of FileTrail let us create a perfect fit for each department, ensuring the maximum benefit for Investco. FileTrail made consensus possible by accommodating the unique needs of each department, while enforcing standards and giving me centralized oversight and control.”

Ember D. Krumwied, CRM
Records Manager
Investco Financial Corporation

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Investco gains high compliance with FileTrail and implements formalized retention across the enterprise.

Client Profile

Headquarters: Sumner, WA, USA

Industry: Real Estate

Investco Financial Corporation is a privately held real estate investment and development firm headquartered in Sumner, WA. It develops and manages a variety of real estate assets and including residential, commercial, mixed-use and industrial properties. Investco has been part of the northwest community for more than 25 years and believes in building projects that add lasting value to the community.

FileTrail Implementation: 2006

FileTrail Products Implemented

- **FileTrail Professional** - File tracking and records management.
- **FTRetention** - Formal classification and management of retention.
- **FTColorLabel** - On-demand printing of color-coded folder labels.
- **FTeDocs** - Sharing and management of images and electronic documents.

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<http://www.FileTrail.com>

Background

Investco Financial Corporation's 25 year growth demanded the need for a comprehensive records management program. Ember D. Krumwied, CRM, was hired to create records management policies and practices, and employ records management software to implement these new policies.

Investco performed a comprehensive evaluation of records management applications to select the vendor that best fit their needs. Key functionality that Investco was looking for included:

- A browser-based solution
- File tracking capabilities
- Records retention management
- On-demand color coding
- Integration with ECM systems

Investco selected FileTrail based on its ability to provide all of these functions. Being completely browser-based, with unlimited user-defined fields and an unlimited classification system set FileTrail's apart.

The Challenge for Records Managers

“One of the biggest challenges I faced as a CRM creating the company's first records management program was winning support and compliance of all the staff and departments that I needed to be successful,” said Ember D. Krumwied, Corporate Records Manager.

Implementing an enterprise records management (ERM) solution involves creating standards for records classification, records-handling practices, and retention for the entire organization. The initial challenges include mapping the data descriptors used by each department, creating retention policies, selecting the record management software, etc. The capstone challenge once that work is done, is getting people to comply with the new policies and use the software.

“FileTrail made consensus possible by accommodating the unique needs of each department, while enforcing standards and giving me centralized oversight and control,” said Krumwied.

Application Highlights

- **Migration:** Migrated data from an in-house application that inventoried records.
- **Classification:** FileTrail's unlimited classification system accommodated 205 organizational units, 340 categories, 9 types of media and 300 records series.
- **Electronic Documents:** FTeDocs allows electronic files and images to be managed and viewed, reducing the need to retrieve the physical folder.
- **No Limits:** FileTrail's unlimited screen definition tools are configured to provide a precise fit to each element in Investco's classification.

Key Results

- **Single System:** FileTrail provides a single system by which records are inventoried and managed, fitting the diverse needs of each business unit and site.
- **Classification:** FileTrail was easily deployed to all staff because of its 100% browser-based interface and automatic authentication using Windows security.
- **User Adoption:** FileTrail was well-received by staff in training and production use because of its intuitive and friendly design.

Customer Insight

FileTrail has a unique methodology for delivery that leverages the fact that FileTrail is completely browser-based. We did all the initial setup jointly, on-line. One of the biggest benefits of this approach is that you are not forced into making a decision quickly like when you have a vendor on-site. Many times I needed to research an issue or gather consensus from our organization; we simply scheduled the next configuration review once I had the information I needed.

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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Accommodating Diverse Needs

Keeping track of corporate records is a challenge in a varied and decentralized environment. There are many departments at Investco, each with their own filing system. In addition, many remote properties across the US create and/or house records that are subject to retention policies.

FileTrail addressed the challenges at Investco in several ways. First, the unlimited classification system and unlimited number of user-defined fields created a perfect fit for each department.

FileTrail also addressed the challenges with enterprise-class security, controlling access so that each department felt as if it had its own private, secure system. And through its browser-based interface, FileTrail was easily accessible and familiar to staff.

"The ease and organization of FileTrail's program has not only saved me time, but made my job much more manageable," said Amanda Perry, a paralegal in the legal department.

Real Impact

As a result of implementing FileTrail, Investco is undergoing subtle changes that have deep, meaningful impact on efficiency and risk. First, creation of records is now a standardized process throughout the organization.

Validation enforces standardization of data. As a result, the quality of search results is improved, making it easier for users to locate needed records. Standardization and automation of color coded labeling saves time in creation of new files, while simplifying retrieval and refiling.

"I wanted to let you know that I printed all my labels and they look AWESOME!" said Nicole Howe, HR Administrative Assistant. "Thanks for doing such great training - FileTrail is easy to use. What a great system!"

FileTrail gives users autonomy over the records in their business unit while ensuring that standards are kept. This autonomy eliminates the concern about compliance in the departments and remote locations and the need for records management staff to review everything.

"User-independence comes from the ability of each user to now create, search, and retrieve the information they need with little or no assistance," said Krumwied. "This independence is vital for a growing organization where your administrative staff may not always be available to assist."

Compliance becomes universal across the organization as standards are applied. In some areas compliance is automatic because of FileTrail, while in others compliance is easier to apply because of the tools within FileTrail.

"With the ability to now conduct records audits, departments will be in a better position to determine if the company policies and procedures are being followed," said Krumwied. "This will not only ensure that all business records are properly being cared for, but will also help to document compliance with regulations and laws."

Contact FileTrail Today!

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

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