

"I'm very pleased with FileTrail. We're going to be a long-term customer."

Robert
Assistant Vice President
Insurance Industry Firm

Case Study

Insurance Industry Firm

FileTrail improves claim file tracking.

Client Profile

Headquarters: Manchester, NH

Industry: Insurance

The client is an insurance industry leader in claim disposition and reinsurance recovery services - primarily involving claims arising from "long-tail" exposures and liabilities, as well as discontinued insurance businesses. The client migrated to FileTrail in late 2004 to manage its active and inactive records for multiple operating units.

FileTrail Implementation: 2004

FileTrail Products Implemented

- **FileTrail Professional** - Complete file tracking and records management automation..
- **FTMobile™** - The software allows files to be checked-in, checked-out, transferred and boxed without being tethered to a workstation.
- **FTColorLabel** - On-demand printing of color-coded folder labels.
- **FTSynchronize™** - Loads and updates data from upstream resources to keep FileTrail data synchronized and up-to-date with authoritative systems.

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Background

FileTrail's Web-based records tracking and management solution was ideal for this New Hampshire-based reinsurance company. They had expanded into offices on both coasts and operated different file rooms for different business units. Using their old tracking system to manage files for the growing company had become difficult.

The Problem

The client needed a solution that would integrate all operations into a single system with standardized processes.

"We have offices in other parts of the country and our old Windows-based system would have to go through the Wide Area Network (WAN) to get into our server here and the response time on the WAN was already a problem for users," explained Robert, an Assistant Vice President.

The client was also having issues with their old system.

"The old tracking system was Windows-based, so it had to be installed directly on each PC, and everything was hard-coded so it was very difficult to change," Robert said. "We had about 75,000 records in the system and as we moved up in number of records, we started having some issues," he said.

"Every once in awhile, the import would skip a couple of records," Robert said. "When we found files that were not in the system, we would just manually key them in. It took a little more work, but we always captured all of the records."

Then one day nearly 6,000 files were checked out with no user identity recorded in the audit trail. When that happened, they decided that they needed to find a different file system.

A Smooth Transition

"The transition to FileTrail went very smoothly," Robert said. "We went through each unit to determine exactly what they wanted and when it was time to implement FileTrail, we were able to have those settings and capabilities because of the built-in configuration tools."

Using FileTrail Everywhere

Most of the client's 275 employees actively use FileTrail, accessing the system through the internet from remote offices. This bypasses the company's over-burdened WAN, providing fast response times to FileTrail users in any office.

Application Highlights

- Data resides in a SQL Server 2000 database in the New Hampshire headquarters, and is accessible at all locations across the US.
- New claim data loads into FileTrail each night, triggering creation of color-coded labels and assembly of new folders.

Key Results

- **Save Labor:** The client now manages the filings needs of 85 claims staff with just 2 clerical staff.
- **Increased Efficiency:** Each of several file rooms that serve the different operating units is managed independently; FileTrail automatically routes requests and re-filing to the correct room.
- **Reduced Costs:** Operating costs were reduced by replacing a Windows application that required more maintenance, had fewer features and was beginning to fail.
- **Easy Configurability:** Screens, search forms and labels were easily configured to reflect the fields that best describe each type of record.

Customer Insight

The Web technology used in FileTrail means software is installed on the FileTrail Web server. With our old system, we had to go to every desktop to install an upgrade; with FileTrail, we run an upgrade script on a server and never have to install at an individual workstation.

Having the ability to assign icons to represent the different file types in FileTrail makes it easy for our staff. It helps remind those creating new files what type or color of folder to use. Also, it is good for the insurance staff because it reflects the actual filing media that is used.

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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Added Capabilities

FileTrail has delivered new capabilities and increased flexibility. Data entry screens, search forms and search results were easily configured for each different type of file. This flexibility makes each business unit feel like they have a system that was custom-built for them.

Label printing is much easier now than with the old system. Before FileTrail, employees had to print color-coded labels from a specific PC where the software was installed. Now they can print labels from any PC, in any office.

“In our old system, you had to select the label you wanted to print and which records,” according to one clerk. “But you could select a label that was wrong for the data you were working with, so you had to separate data entry into batches based on the label. FileTrail eliminated all those issues and made labeling a smooth process,” she said.

Web Technology

FileTrail provides some unique advantages to the client because of its Web technology. The client is able to automate file management for multiple locations. Staff use FileTrail to track active records for several file rooms, as well as inactive records stored offsite in a warehouse. All staff members use the same system and see the same interface regardless of their location.

In addition, FileTrail's Web technology means software is installed only on the server - not at the individual desktops.

“With our old system, we had to go to every desktop to install updates. With FileTrail, we run an upgrade script on the server and we're done,” said one IT manager.

Standardized Labeling

The client has standardized labeling with customized designs that meet the unique needs of each division and each different file type. FileTrail's flexibility accommodates the different configurations, automatically printing the correct label for each file.

Different label designs are used for each type of file, such as assumed claims, policy files and reinsurance files. Each design contains the data relevant to that type of file.

Integrating Seamlessly

The client uses FileTrail's FTSynchronize utility to import new claims and synchronize updates each night. FTSynchronize is user-configurable, which allows the client to make changes, without paying a fee to a vendor.

A Successful Conclusion

Migrating to the FileTrail system has solved a lot of the problems encountered with the old system.

“FileTrail has been running over a year without any problems,” according to an IT Manager.

“Everyone is much happier with FileTrail. The software is flexible and the people are easy to work with,” Robert said. “I'm very pleased with FileTrail. We're going to be a long-term customer.”

Contact FileTrail Today!

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

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