

FileTrail®

HEADQUARTERS:

South Jordan, Utah

SUBSIDIARY**LOCATIONS:**

Italy, Japan, Germany,
China, Brazil

CUSTOMERS:

Dentists, orthodontists,
practice groups, dental
labs, government
agencies, and universities



Success Story | Ultradent

Ultradent Enhances Productivity with FileTrail

Modern records management system transforms daily tasks and increases staff efficiency

PROJECT SUMMARY

Company aimed to streamline its regulatory tracking processes with a modern records management system that featured customized search and reporting tools.

FILETRAIL PRODUCTS IMPLEMENTED

FileTrail Records Management

Software to manage the creation, storage, retrieval and destruction of paper records and electronic documents.

“FileTrail has really helped our department improve productivity. I think FileTrail would help a lot of other companies that need to track regulatory information.”

Katie Haas, Regulatory Affairs Specialist, Ultradent

BACKGROUND

Founded in 1978, Ultradent is a global leader in the development and manufacture of high-tech dental materials, devices, and instruments. Over the years, the company has cultivated a reputation for producing quality dental products. As a result, government agencies, labs, dental professionals, and universities around the world rely on its solutions.

Today Ultradent exports dental products to more than 100 countries. Before it is able to sell its products through distributors abroad, however, the company must register products with countries' Ministries of Health to fulfill regulatory requirements. In recent years, as worldwide sales have skyrocketed, Ultradent's management made it a priority to streamline this process.

THE CHALLENGE

Once an Ultradent product is approved for sale by a country's Ministry of Health, it is issued a certificate with an expiration date, along with other relevant information. Saving and tracking these certificates is an important aspect of protecting international sales. The company must stay abreast of certificate expirations, paying fees promptly to keep products licensed and available.

When Ultradent began selling its products internationally, it set up electronic folders to organize certificates by country. However, as sales increased this solution became inefficient. "We work with over 100 countries around the world. Every country has the possibility of registering hundreds of SKUs. Some countries even have more than one distributor, and each distributor has to register products individually," said Katie Haas, Regulatory Affairs Specialist.

Five years ago, to improve this process, Ultradent created an Excel spreadsheet to track detailed certificate information. Soon, however, Excel was overloaded with data. Said Haas, "Every time we received a new registration, we updated the spreadsheet. The problem was that Excel would either take forever to open, or it would crash our PCs. There was too much information." This situation meant staff spent considerable time trying to track data, expiration dates, and payments. Eager to streamline this process, Ultradent turned to FileTrail.

THE SOLUTION

Ultradent's unique requirements meant it would benefit from FileTrail's highly customizable records management software. To design a solution that met company needs, Ultradent spent about three months meeting weekly with FileTrail's team to identify search fields, customize reports, and specify workflows.

The deployment culminated with two training sessions for the company's 12 users. Today, staff have a records management solution that speeds up its regulatory tracking processes with easy search, streamlined data access, customized reporting, and forward planning capability.

- EASY SEARCH
- STREAMLINED DATA ACCESS
- CUSTOMIZED REPORTING
- FORWARD PLANNING CAPABILITY



● EASY SEARCH

"We worked with FileTrail to specify the search capabilities that would give us the best results. Everything revolves around a product master list with user-defined fields that we specified. This makes finding everything easy, as we can search by certificate number, expiration date, country, or SKU. For example, we can type any SKU into the search, and FileTrail displays every country that SKU is registered in, as well as the documentation related to it. Before FileTrail, we'd spend hours manually going through folders and opening each certificate to see which products and SKUs were registered. Now, we get all that information with a quick search on SKU or country in FileTrail."

● CUSTOMIZED REPORTING

"In addition to speeding up our daily productivity, our custom reports have helped us look good with customers. Recently, we had a distributor visiting from China. They asked to see all of the certificates that expire this year. Thanks to FileTrail's customized reporting, I was able to quickly run a report to display everything that we have on file. Then, we sat down and compared our report to theirs. It was great," said Haas.

● STREAMLINED DATA ACCESS

"An example of how FileTrail helps us daily: A few weeks ago, our CEO wanted to know if one of our special dental tips was registered in China. In the past, it would have taken at least two days to get that information. I would have had to go through each individual certificate in our China country file, find the product registration, and then email the distributor for a translation," said Haas. "Instead, I just opened FileTrail, typed the SKU, and it came up showing it was registered. Plus, I learned the registration expires later this year."

● FORWARD PLANNING CAPABILITY

"I think FileTrail would help a lot of other companies that need to track regulatory information. For each country our products are registered in, we track their expiration dates. Hundreds of Ultradent product registrations expire every month. As an organization, we need to be able to budget for those expirations and anticipate expenses throughout the year," said Haas. "With a reporting tool that lets us pull up this data, FileTrail has become a key part of our internal forward planning."

LOOKING AHEAD

As Ultradent looks toward further improving staff efficiency, it plans to increase its use of FileTrail records management. "We are aiming to expand how we manage certificate expirations with FileTrail, as well as develop predictive forecasting for regulatory work in different countries during the year ahead. Additionally, we plan on adding fields to the database to track regulatory changes that may prompt a re-registration or notification," said Karen Kakunes, Regulatory Affairs Manager.

Another potential opportunity we have is to expand the use of File Trail into other departments, such as legal and/or Purchasing as a means to manage and store supplier contracts, quality agreements, etc. Understanding its potential, the system will be suggested as a means to coordinate these efforts.

ABOUT FILETRAIL

Since 2000, FileTrail has been developing, implementing and supporting enterprise-class information management solutions.

Deployed all over the world, the company offers a highly configurable suite of records management and governance tools to help organizations manage the complete information lifecycle.

FileTrail is the *only* records management system for law firms, offering both cloud and on-premise solutions. FileTrail integrates with Iron Mountain, Elite, and the Intapp suite. It leverages APIs to apply retention policies and disposition to documents in NetDocuments, iManage, OpenText eDOCS, and other repository-based products.

For more information about FileTrail's records management and information governance software, visit

www.filetrail.com

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