How a Large State Agency Became More Secure and Productive with Filevine

The 6-division agency now accomplishes more work with fewer administrative headaches.

THE CHALLENGE

A major U.S. state agency struggled to serve its constituents in the face of growing cybersecurity threats and limited resources.

The state-wide agency is split into 6 separate divisions, each of which provides a wide range of crucial services to residents. Its leaders struggled to effectively manage its diverse, complex, and high-stakes workflows, while providing accessibility to employees and community members and ensuring data security. These challenges were exacerbated by public demands for greater efficiency, leading to budget cuts and resource limitations.

To manage this complex workflow, the agency relied on a patched-together structure of various software services, each providing a specific point solution. This disjointed system created new frustrations and inefficiencies and heightened security risks.

Filevine's all-in-one platform erased administrative headaches, tightened security, and allowed the agency to reach new heights of productivity.

In June 2024, the agency replaced its outdated legacy software with Filevine. While it chose Filevine for its high-grade safety and security features, since implementation, it has also recorded significant improvements in productivity, accessibility, and efficiency.

The agency has recorded improvements in 8 separate categories:

1. **Protecting Privacy**

   The agency's top priority is data security. Government agencies are one of the top targets of cyberattacks, and data leaks can have dire consequences for both institutions and the public they serve. Filevine improves the agency's security profile through:

   a. **State-mandated certifications.** Filevine's CJIS tenant meets the state's high-level security and compliance needs.

   b. **Access control.** Using Filevine, administrators control who can log in and access specific sets of data at any given time.

   c. **Secure sharing.** With password-protected share links and guest access options, the agency can control how information is shared externally with greater security.

2. Ensuring Accessibility

Many employees work from the field, visiting clients and inspecting sites. Because Filevine is securely hosted on the cloud, they can now log into their work from any device or location, without being tied to their local servers. They refer to Filevine's mobile view as a "game changer."

Additionally, as agency workers must address a variety of tasks at the same time, they report benefits from being able to open multiple Filevine tabs at once.

3. Managing Tasks

The agency has unlocked greater efficiency by setting role-based tasks to automatically trigger, based on curated scenarios or phases. Each user now has their own task list and all their communication takes place within one system, reducing email-overload and cutting the time they spend linking communication with cases.

4. Meeting Deadlines

Deadline Chains allow the agency to set an initiation date to automatically calculate task deadlines. It has also created custom reminder schedules that automatically schedule tasks for users on a need-to-know basis.

5. Creating Documents

The agency is now able to generate long and complex documents with the click of a button, using templates stored within Filevine. Version history and user stamps allow it to track changes that are made to the documents, and drafts can be accessed as needed.

6. Managing Email

With Filevine's native email previewer, any user in a project can view, reply, or forward an email that has previously been saved to the project. This significantly reduces the number of users that are cc'ed on any email thread.

7. Communicating Internally

The agency uses Filevine's Sidebar to discuss sensitive items without automatically saving the conversation within the notes of a project. Filevine's security features outperform those of Microsoft Teams or Slack, giving government workers greater peace of mind when they discuss confidential information internally.

8. Analyzing Data

Filevine's intuitive reporting features allow administrators and stakeholders to have a quick view of the data and metrics they need, without having to hunt around the system or track down employees. Administrators choose key reports to be sent to them at a cadence of their choosing, and users curate the specific information they need to analyze trends.

Without adequate project management software, government agencies face dire consequences, including cybersecurity risks, workplace stress, and public dissatisfaction. But with Filevine, leaders can take control of their agency's workflow to protect their data and open up new levels of productivity — creating a better future for their institution and the public they serve.

Filevine