

# Sweetwater Valley Title

## Title Company Upgrades From File Cabinets to Digital Document Management System

### Company Facts

#### Overview

- ▶ Location: Athens, Tennessee
- ▶ Industry: Real Estate
- ▶ Website: [www.sweetwatertitle.com](http://www.sweetwatertitle.com)

### Success Highlights

#### Challenges

- ▶ Generated high volume of paper records daily
- ▶ Overwhelmed by file storage needs

#### Solution

- ▶ DocStar® Enterprise Content Management (ECM)

#### Benefits

- ▶ Easily applied previous best practices to electronic system
- ▶ Use templates to expedite common processes
- ▶ Gained instant access to search and view older records
- ▶ Reduced physical document storage needs
- ▶ Enhanced workflow efficiency



Almost 60 years ago, Peggy Pearman had a vision to replicate county courthouse records, then organize them and put them into a private office. Her aim was to furnish realtors, financial institutions, and the general public with escrow and title insurance services in a timely, professional, and courteous manner.

According to Brad Landers—Pearman's grandson—by establishing a title plant, as it's called, she could do 80 percent of her records search work right in her office instead of at the courthouse, which would allow her to do property searches more quickly and easily.

That was 1947. Fast forward to 2006, and you still can find Peggy and her family—and a half-dozen or so others—providing title services for residents and businesses in 11 counties in eastern Tennessee from her firm, Sweetwater Valley Title Company, based in Athens. But now, the records are stored and indexed electronically, and they're even more easily accessible, thanks to a DocStar imaging and retrieval system. "With DocStar, we use the same idea she had then, but now we carry it out via imaging instead of an index-card system," Landers says.

In 2002, a local DocStar partner demonstrated the system to the title company's office manager. As assistant office manager, Landers got a look at the system, too. "I really liked the user-friendliness of it," he recalls. Besides the ability to scan and retrieve documents, Landers was particularly impressed with how it allowed for customization of templates, which allowed his company to implement and use the system without having to change entire workflows.

Landers worked with the local DocStar partner to set up the filing templates. "They helped me establish what templates I needed," he says. "They let me know the capabilities and, because I know my industry, I was able to figure out the best use of them for our business." The local partner helped get scanning and image retrieval installed on office desktops. They set up two scanning stations, which were shared by three people who did the digitizing. Once scanned, documents could be managed from any desktop, Landers says.

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—Brad Landers | Sweetwater Valley Title

### Filing and finding documents

After documents are scanned in, the search and retrieval process is driven by key words and document titles. “The index searches key words, and all of the documents are titled with the property owner’s name and logged,” Landers says. Office staff can find a property record by using addresses, deed information, a map of parcels, deed of trust book references, or any of a number of ways, all of which lead back to the property owner. Storing records by property owner name is just an extension of how the information was indexed manually, in the years before DocStar.

Once a closing takes place, all documents relating to the transaction are scanned. Then, Landers says, staff can email or fax it to the appropriate parties, right from the server. That’s a feature the folks at Sweetwater Valley Title find quite useful. “Before DocStar, if we had to send an 80-page closing package to a lender in California, for instance, you’d have to sit there and fax it, or send a large document via FedEx,” he says. “Now you can automatically send it via email or fax using DocStar.”

The organization sees plenty of 80-page documents during the course of a month. “We’re scanning about 8,500 to 9,000 different documents each month,” Landers says. “That includes those dealing with courthouse matters, the closing packages, and the title reports we send to our customers.” Each of these document types is stored in the DocStar system for future reference.

### Building on familiarity

Landers says the switch from paper to electronic records was challenging for some of the staff. “It took a little bit more time for some to get adjusted than others,” he says. “They were more used to dealing with cards than computers. Part of my job was to get them transformed from pulling out the old index cards to pulling up the new images in the DocStar server.”

The job was made easier because the documents were the same ones they had been using all along. Because staff members were so familiar—and comfortable—with their system, to introduce the change, Landers looked at current processes and tried to incorporate them as much as possible. “We really mirrored the same system that was started 60 years ago,” he says. “Now, only the media has changed. We use a computer and check the screen instead of opening a file cabinet and looking through 50 index cards.” Plus, as Landers says, co-workers found retrieval through the system to be rather easy—certainly easier than trying to navigate their way through 2,500 square feet of file cabinets.

Going with DocStar allowed Sweetwater Valley Title to stop adding to that file space. In fact, the office is working to reduce the amount of room it has housing cabinets, so it can accommodate another closing office or another employee. That, of course, is a good sign for the business—it’s growing. It’s also welcome news for employees, who recognize both the need to add staff and the opportunity to make better use of the space.

### Faster and better

According to Landers, a top benefit of going with DocStar is enhanced workflow efficiency. “Say I did a title search in 2003, and the bank comes back and orders a report on the same piece of property in 2006, instead of having to get up, go back, search the card system, then go find the file it’s in, now we can just specify name or address from DocStar,” he explains. “We can now retrieve that same title report in a matter of seconds, rather than several minutes. When you have 30 orders come through the door in one day and you need to get 30 orders out very quickly, that makes a big difference.”

It’s not only a matter of timing. Sometimes it’s a question of finding the paper in the first place. “The file cabinet is only as good as the person who files,” Landers says. The same is true when documents are filed electronically, but the search options are greater. “With a file cabinet, you just use their last name and first initial, and hope the document is where it’s supposed to be,” he says. “With DocStar, you can use the property address, loan amount, lender information or other search items.”

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DocStar also helped create an audit trail for closings. Often, if a problem comes up with a title report, it's years down the road—perhaps after someone else has researched it. And it's traditionally difficult to recreate exactly what happened. “With DocStar, you have all of the information right in the system, where you can just go back and access it just like it was a court room report,” Landers says.

“Lawsuits frequently come up in the title business,” Landers says. “By having all the information in the system, we can look back and show what was ordered and why we did what we did. It could be something as simple as someone later claiming they wanted information on Block 45, but we can look back on the order and show them where they wrote, ‘Block 44.’ To be able to have that information scanned in, and to be able to show them, could go a long way to fighting a suit.”

### Backing up, and going forward

The ability to track and maintain records is enhanced by the ability to easily back up data. At Sweetwater Valley Title, information is directed to a network server, which is backed up regularly. “The server will back up the data to a disk, and all I do is copy the disk,” Landers says. “I'll make a copy according to our backup schedule, and then take that disk off site.”

Landers says the company is also looking into taking the scanning process off site—to the courthouse. “We've talked about getting a small scanner—a portable—so we wouldn't have to make paper copies at the courthouse,” he says. “Instead, we could scan the information into a laptop computer and bring it right back to the office that way.” It's just one more way the company can make the best use of a system that's changed how—and how well—it does business.

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## About DocStar

Helping businesses translate vision into action for more than 20 years, DocStar delivers a flexible and innovative enterprise content management and process automation platform. Easy to implement and use—both in the cloud and on premises—DocStar proven technology and global process expertise empowers organizations to operate at peak performance, navigate change, and grow.

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