



FileMaker in Action: Research Case Studies

# Modernizing a paper-based historical collection system

Teresa Ingalls, Digital Data Manager  
New South Associates, Inc.



## About the FileMaker Platform.

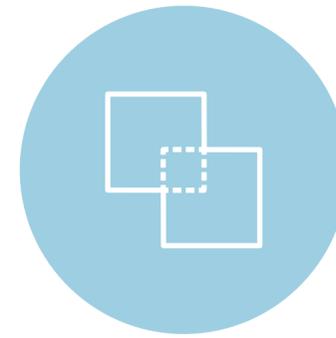
A Workplace Innovation Platform allows you to build custom apps to match the unique needs of your business and helps to better connect your systems, processes, and employees. The FileMaker Platform empowers problem solvers to create, share, and integrate custom apps to address their ever-changing business challenges.

## The FileMaker Platform enables teams to:



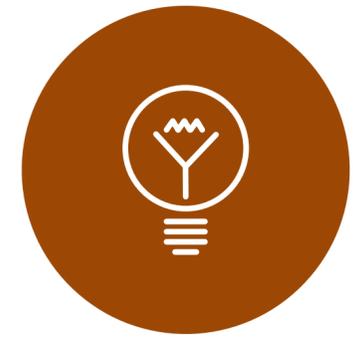
### Escape the work rut.

It helps teams of a few to a few hundred escape the work rut.



### Bridge the gap.

It bridges the gap between appliance apps and enterprise systems.



### Innovate.

It unleashes your ideas and your expertise to innovate your workplace.

## FileMaker Developer Conference

FileMaker DevCon is an annual developer conference that includes in-depth sessions, special interest meetings, face-to-face consultations, and opportunities to network with many FileMaker staff and other experienced FileMaker Platform experts. DevCon is the single most valuable gathering of more than 1,500 FileMaker practitioners from around the world.



# Introduction

This ebook is an excerpt from the original presentation given by Teresa Ingalls at the 2018 FileMaker Developer Conference.

Teresa is an archaeologist with experience in cultural resource and heritage management, museum collections and exhibits, and zooarchaeological research. Teresa utilizes innovations in technology to bring advancements in archaeology and heritage management, and drive workplace efficiency.



**Teresa Ingalls**  
Digital Data Manager  
New South Associates, Inc.

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**New South  
Associates, Inc.**

“ FileMaker is starting to transform all of our business processes.”

— Teresa Ingalls

## About New South Associates, Inc.

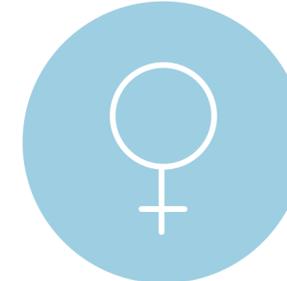
New South Associates is headquartered in Atlanta, Georgia with many offices in the Southeast. It is a women-owned small business that consults with companies about cultural resources.

They specifically focus on archaeological sites and architectural resources, like historic buildings.

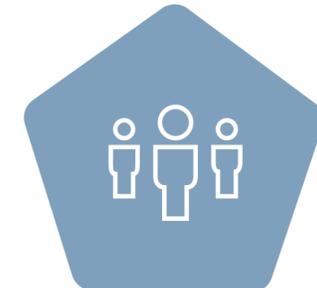
## A few facts...



**Headquartered**  
in Atlanta GA



**Women-owned**  
consultancy



**80 permanent**  
staff members



**Conduct**  
cultural impact  
assessments

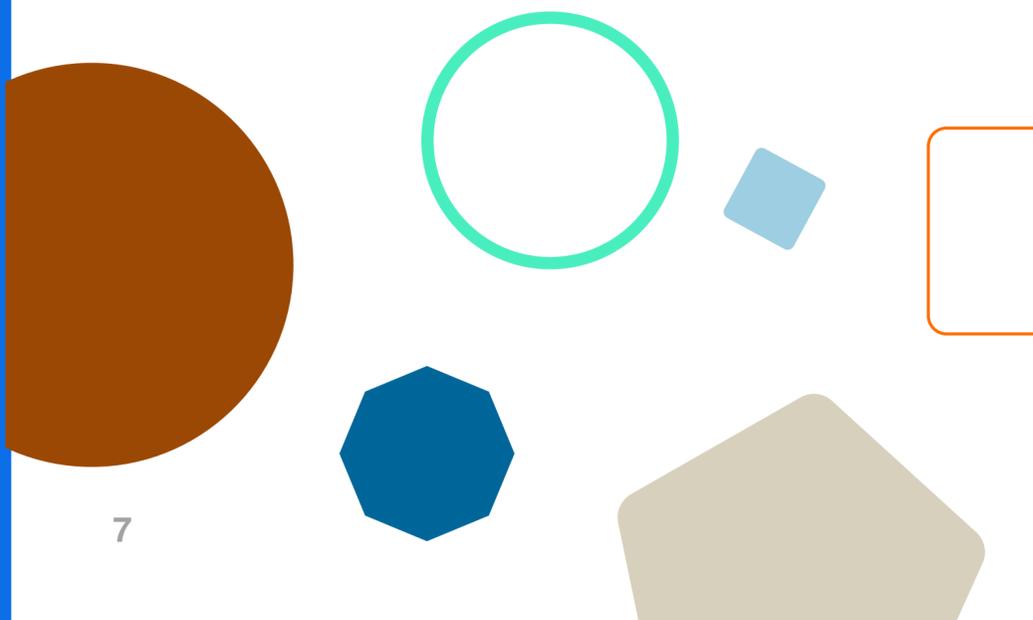


**Consults**  
on archaeological sites  
and architectural  
resources

**In a paper-based system,  
paper keeps piling up, and you can  
forget about mobility.**

02

**The problem**



## Getting "the dirt" on the current system.

Ingalls was tasked with evolving what was essentially a paper-based system into the digital age.

In addition, New South Associates wanted to reduce human error, automate the creation of reports, eliminate duplicate data entry, and a lot more — all in a system that was friendly for users as well as the solution developers.

## Main challenges with the current system:



**Outdated**  
paper-based  
collection system



**Not**  
user-friendly



**Too many**  
manual processes



**No**  
mobility



**Duplicate**  
data entry

# 03

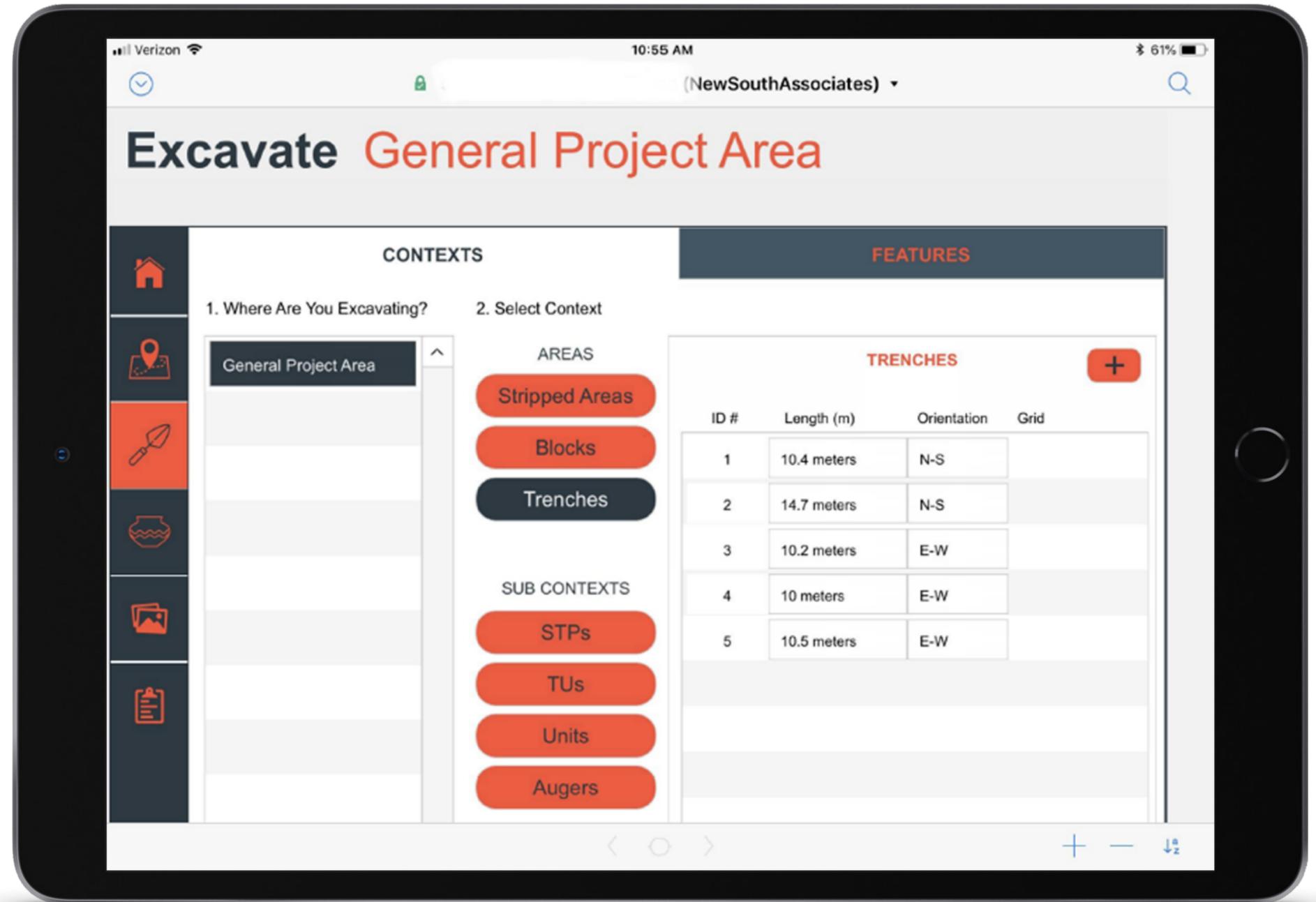
## The solution

“ FileMaker was the best price with the most customization and really friendly to new developers. ” — Teresa Ingalls

## Modernize a paper-based collection system with a modern digital system.

Ingalls set out to tackle the problem by researching the features and benefits of 50 different software options and decided on the FileMaker Workplace Innovation Platform.

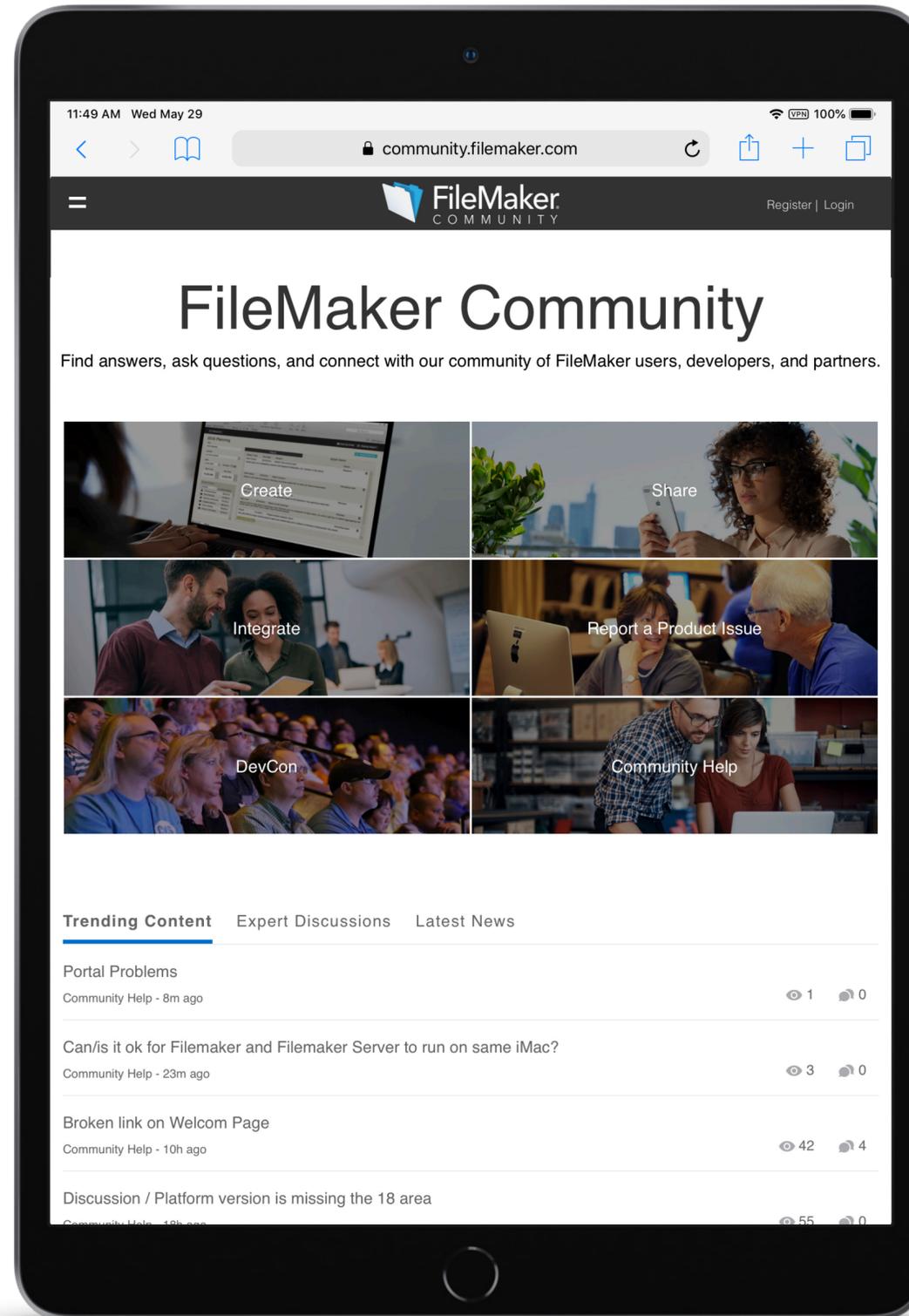
She recommended FileMaker's Workplace Innovation Platform to the board for developing the solution. In short, the FileMaker Platform offered the best price with the most customization and was really friendly to new developers.



Excavation Main Page

# No experience. No problem.

Another reason Teresa Ingalls selected the FileMaker Platform was the support that was available through the online FileMaker Community. Ingalls felt this was really important for troubleshooting during the initial development for a non-experienced developer like herself.



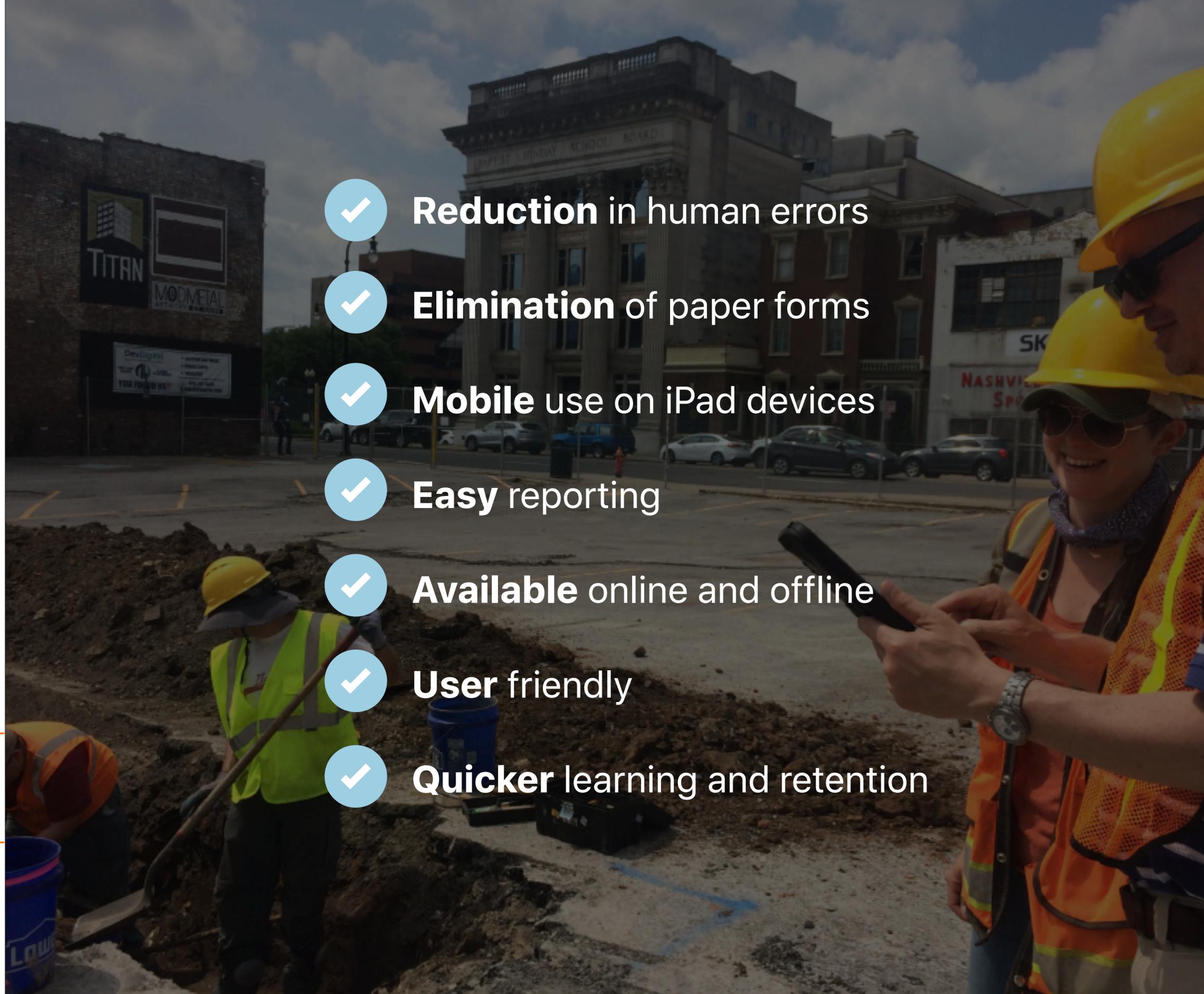
## FileMaker Community

Users can find answers, ask questions, and connect with a community of FileMaker users, developers, and partners from around the world.

04

## Key outcomes

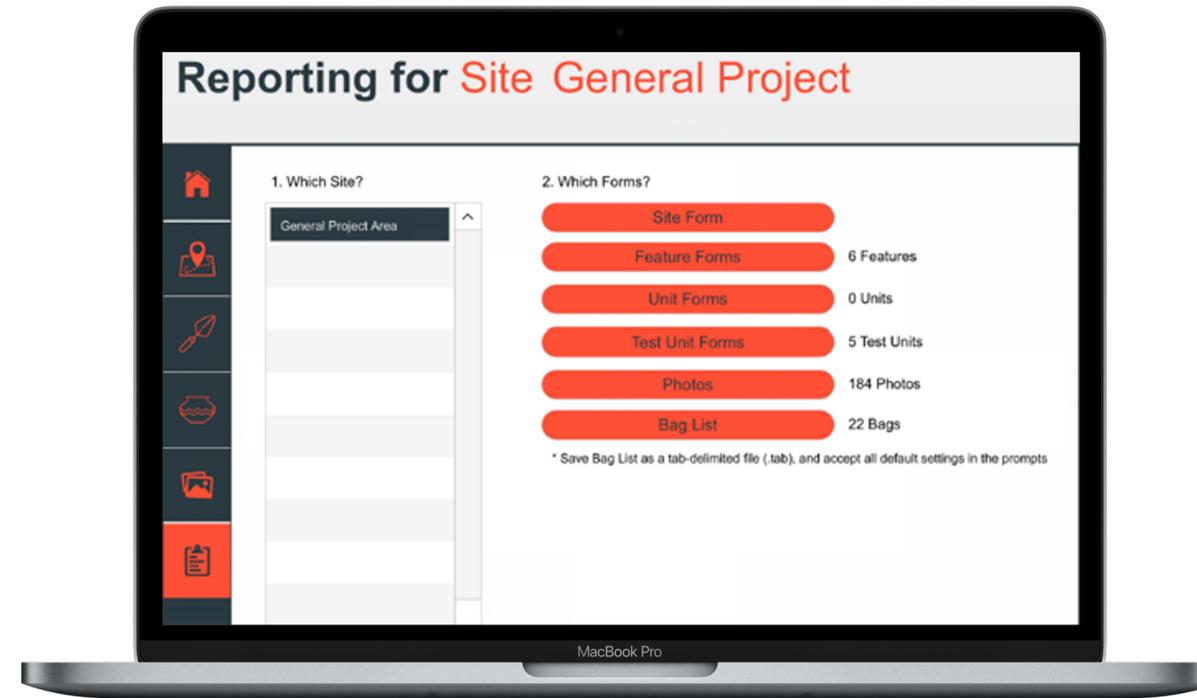
- ✓ **Reduction** in human errors
- ✓ **Elimination** of paper forms
- ✓ **Mobile** use on iPad devices
- ✓ **Easy** reporting
- ✓ **Available** online and offline
- ✓ **User** friendly
- ✓ **Quicker** learning and retention



# Immediate benefits from a custom app.

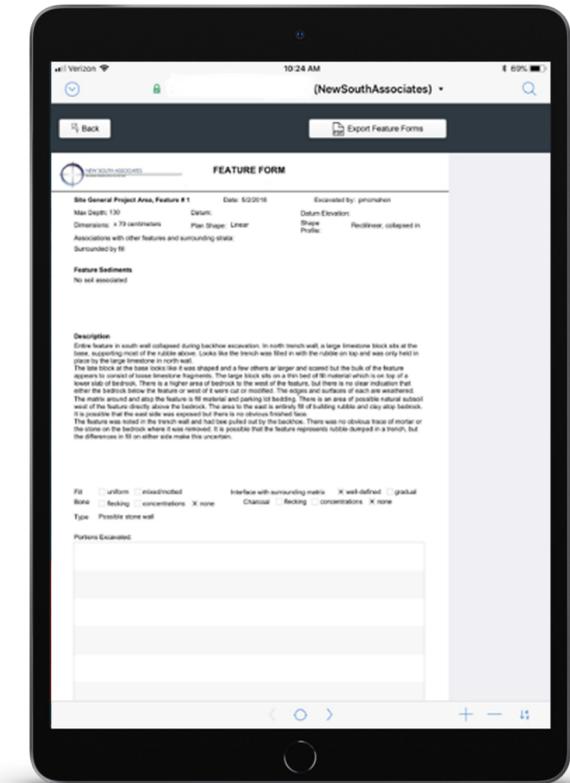
## Challenges solved:

- ✓ State requirements
- ✓ Transcription issues
- ✓ Complex data relationships
- ✓ Human error
- ✓ Quick training
- ✓ Live project tracking



### Back at the office.

All of the collected data is now available for project tracking, and summary data for reports.



### Internal forms were "cloned."

No longer handwritten, these forms are legible and exportable as PDF.

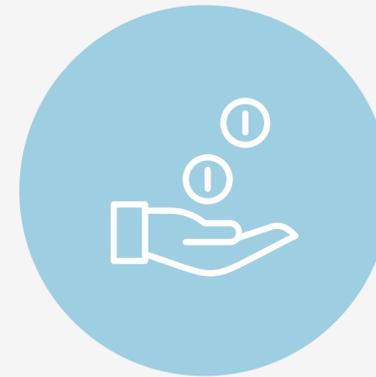
## Early success leads to new innovations in business-wide applications.

The New South board was so excited after seeing the capabilities and possibilities of using the FileMaker Platform, they immediately started to dream up other uses for it across their business.

## New uses for the FileMaker Platform at New South Associates.



**Fleet management**



**Asset management**



**Project and budget management**

# 05

## Next steps

### Watch the full video.

See how Teresa tackled so much more than what she was initially hired to do. Innovation projects have included transforming their cultural assessment processes, developing a fleet tracking database, and migrating their project management system from Fourth Dimension to the FileMaker Platform.



**FileMaker in Action:**  
[FileMaker solutions for a cultural consulting business](#)

### Other helpful downloads:



**PDF document of the entire DevCon presentation**  
[CUS07\\_Ingalls.pdf](#) 8.6 MB

### Explore resources.

Access these great resources to help you along the journey to develop a custom app using the FileMaker Platform.



#### Case study videos

See how companies all over the world use the FileMaker Workplace Innovation Platform to transform their businesses.

[Watch videos](#)



#### 5 signs you are ready to invest in a Workplace Innovation Platform

This ebook outlines the best ways your business can advance with the help of FileMaker, from becoming more competitive to increasing your inspiration.

[Read report](#)



#### Test drive the FileMaker Platform

Sign up for a free trial of FileMaker Pro Advanced and FileMaker Server. Start managing and sharing information seamlessly across iPad, iPhone, Windows, Mac, and the web.

[Start a free trial](#)