



RECORDS MANAGEMENT

Full Lifecycle Physical Records Management

TRACK & LOCATE	AUTOMATED RETENTION	INTEGRATED LABELING	MOBILE ACCESS	SEAMLESS INTEGRATION
Track files and boxes quickly with barcodes and RFID. Respond quickly to requests for retrieval, pickup, or digital scan.	Integrated disposition review and approval process with Legal Holds, all logged in audit trails.	Integrated label designer for printing of labels with barcodes, color-coding, and RFID.	Simplify tracking, auditing, and pulling for request fulfillment and destruction on Android devices.	Background exchanges with archival vendors and upstream sources for data simplify your work day.

PAPER LITE

FileTrail is helping clients keep fewer paper records by:

- ✓ Uniformly applying retention policies to destroy records on schedule and minimize paper storage.
- ✓ Using scan-on-demand requests to efficiently support remote workers.
- ✓ Integration with scanning tools to store the electronic document and destroy the physical record.
- ✓ Storing reference-only documents with searchable content in lieu of an EDMS.

POWERFUL REPORTING

FileTrail provides powerful reporting tools:

- ✓ Non-technical users can design their own reports using the Ad Hoc Reporting wizard.
- ✓ Trend Reports, showing activity over time, are easily configured into graphical reports.
- ✓ Users can arrange many of their favorite reports and graphs on a user-defined Dashboard.
- ✓ Downloads of large reports run in the background and alert the user when complete.
- ✓ Share reports with users and groups, allowing them to run reports without your assistance.

KEY AREAS OF FOCUS



ACTIONABLE DASHBOARDS

FileTrail's dashboards present graphical reporting and actionable metrics that alert you to, and guide you through work that needs to be done.



REQUEST & FULFILLMENT

FileTrail allows users to view records and request pickup of records they have, or request retrieval from wherever the records are located.



USABILITY & EXPERIENCE

Our modern design and simple UI allows users to easily adopt FileTrail. Personalization allows saving of favorite searches and report to be added to the QuickSearch and QuickReports menu.



SEARCH TOOLS

Powerful search options support search on any field with Boolean logic and wildcards. Results are relevancy ranked, incorporating frequency and proximity.

GLOBAL CLOUD

FileTrail in the Cloud provides records management without the hassle and cost of deploying and managing on your servers. The Cloud solution can be set up quickly with no software installation and low capital expenditure. Our centers in US, Canada, UK and EU accommodate your local and global requirements.

If you need extra security and want to manage FileTrail onsite – we have you covered. All the great features you have come to expect from FileTrail are built in and available to you, plus our expert team of solution consultants help you configure and deploy FileTrail, still giving you a low cost of ownership and a highly configurable solution.

MIGRATION FROM LEGACY SYSTEMS

The extreme configurability of FileTrail – unlimited user-defined fields and user-defined screens for different types of records – makes it easier to migrate legacy data by conforming FileTrail to the legacy data. The quality of data collected day-forward can be impacted by defining new screens with different fields and stricter validation.

FileTrail has experience migrating data from a variety of legacy systems and data formats.

OUR CORE VALUES SERVE YOU

CUSTOMER FOCUSED	CONFIGURABLE	EASY UPGRADE	SUPPORT	MIGRATION PATH
Customers love FileTrail because we listen and build software that works the way people work.	Easy configuration to perfectly fit your file plan using unlimited user-defined fields, searches, reports, and more.	Easy application of new releases lets you take advantage of our customer-focused continuous improvement.	Context-sensitive help can be augmented by user-defined help to minimize the need for external support.	Continuous improvement ensures that you never find yourself in a dead-end product, falling behind in technology.



BOOST PRODUCTIVITY:

File room staff gain powerful tools that save time and improve the service back to the organization.



RESOURCE SAVINGS:

Reduce the number of staff searching for an important file while eliminating costly fire drills.



TIME SAVINGS:

Spend less time looking for records, finding them in one central location with a simple search.



COMPLIANCE:

An organized and purpose-built approach allows requirements to be met without duplication of effort.



REDUCE RISK:

Meet compliance regulations by automating policy execution and utilizing actionable dashboards.



EFFICIENCY:

Eliminate the time needed to locate information. Find what you are looking for with no hassle.

EXTEND GOVERNANCE TO ELECTRONIC DOCUMENTS

Automate retention and disposition of electronic documents by adding FileTrail Governance. Our fully automated disposition workflow is applied to your documents in your EDMS, file shares, and other repositories.

FileTrail is the leader in information governance for legal and other highly regulated organizations in North America, the UK and the EU. FileTrail's automated solutions modernize records management and improve IG programs, reducing both risk and cost associated

with physical records, client file transfers, policy compliance and more.

Contact us today to learn how your firm can stay on track with FileTrail.
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