



RECORDS MANAGER

Full Lifecycle Information Governance for the Energy Industry

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



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.

FIELD AND WELL STRUCTURE

FileTrail is designed to align seamlessly with the Energy Industry's data architecture, employing a customizable 2-level Field-Well list to cater to their unique requirements. This versatile framework is further capable of being adjusted to methodically manage the presentation of physical records across various categories such as Pipeline, Station, Product, and Project, ensuring a tailored fit to the client's needs.

All functionality revolves around these lists – Field-Well, Pipeline, etc., including the Workspace which provides access to physical records. One or more physical records can be selected for use in transactions, exports, or reporting. These lists are further leveraged in other modules that enhance or expand the scope of your FileTrail system, including:

- Applying legal holds to all records at once for a Field, Well, etc.
- Approving disposition by Field, Well, etc.
- Working with records and documents in acquisition or sale
- Running searches or reports filtered to the selected Field, Well, etc.
- Viewing Well Logs and other documents for the selected Field, Well, etc.



MANAGE WELL LOGS AND OTHER DOCUMENTS

Add Well Logs and other documents to FileTrail for reference-only viewing. Documents are visible by more staff, at a lower cost than storing in an EDMS, while security allows you to control who can view and who can add new documents.

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 leads in information governance, tailored for the energy sector.

We streamline your data management, from physical records to digital documents, ensuring seamless operations and compliance.

Our solutions automate critical workflows and improve document accessibility, all while reducing costs.

Partner with FileTrail for efficient, secure information governance that propels your energy business forward.

Trademarks and Registered Trademarks are property of their respective companies.

We integrate with a major EDM systems, file shares, HR systems, major financial systems, and security provisioning systems, to create a fully integrated and automatic solution that saves labor, reduces costs, and reduces the reliance on internal IT staff.

Stay on track with FileTrail. We'll help you get there. Contact us today for a quick discovery call. www.filetrail.com

FileTrail



sales@filetrail.com
Filetrail.com