

# FILETRAIL<sup>®</sup>

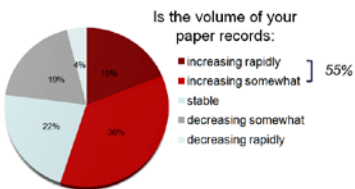
## Gain Control of Physical Records with FileTrail RM

### FILETRAIL RM HELPS COMPANIES ACHIEVE THE FOLLOWING:

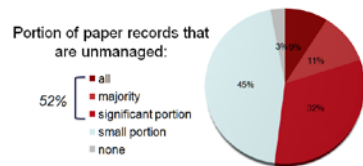
- ▶ Enforce retention and privacy policies
- ▶ Dispose of physical items consistently and defensibly
- ▶ Reduce the volume of lost/misplaced files and related items
- ▶ Maintain visibility and control over information stored off-site
- ▶ Decrease in the cost of information audits and inventories

### PHYSICAL RECORDS NEED FILETRAIL

The volume of paper is increasing at a majority of organizations.



A significant portion of records are in paper form.



Source: AIIM 2009

### THE "PAPER PROBLEM"

- ▶ Significant volume - documents are a primary work product
- ▶ Active files move around and are used by many
- ▶ Audits consume time and resources better spent elsewhere
- ▶ Managing documents according to their retention schedule
- ▶ Enforcing RM and privacy policies

### Overview

FileTrail RM provides the most complete physical records management solution available in the market. For more than ten years, FileTrail has been delivering market-leading features designed to help front office workers, file room personnel, and records managers find, access and defensibly manage their physical records—all in a way that supports their business processes. Companies today realize that many of the traditional processes they've relied on in the past—including spreadsheet-based tracking or custom Access database applications—no longer meets the rigorous demands of the organization, nor do they satisfy the requirements of outside auditors and regulatory agencies.

Recent studies suggest that the challenges and inefficiencies posed by physical records are getting worse—not only is the amount of physical records increasing dramatically but the majority of it is not managed in adherence to corporate or regulatory policy. However, in the "paper problem", paper really isn't the problem at all. Rather is the lack of control over the paper and other physical items that creates costs, inefficiencies and risks. Companies need to better manage their physical items and increasingly organizations are turning to FileTrail solutions to help.

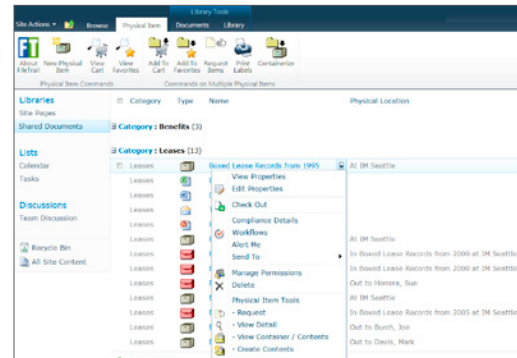
### Benefits

The FileTrail physical records management solution helps companies by delivering critical functionality—in a way that supports real business processes—to enable the organization to improve compliance, reduce information costs, and unlock value captured in physical records.

### Improve Compliance

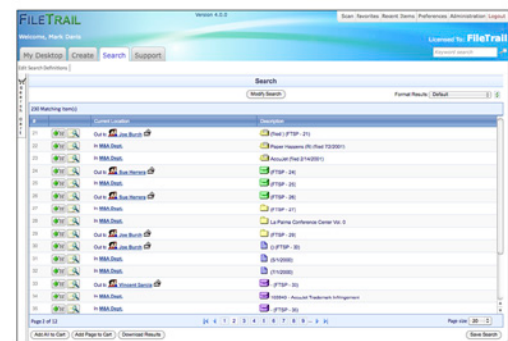
FileTrail RM allows records managers to enforce the retention and privacy policies over all physical items that exist across the organization—from

### FileTrail for Sharepoint



Records Managers appreciate the intuitive tools they can access from the SharePoint ribbon and End Users benefit from the workspace that displays both electronic and physical items.

### FileTrail Webclient



Records management features are available to users through their browser. Easy to use features and fully localized to meet the needs of global clients.

assigning retention, to controlling access, all the way through to monitoring use. FileTrail RM provides tools for consistent records creation by creating standard processes, easy configuration and through validating record details with authority systems. It also allows records managers and legal staff to include physical records within the discovery process—bridging the gap between physical and electronic information and providing comprehensive legal hold and collections activities.

### *Reduce Costs*

Driving efficiencies across an organization is a priority, and efficiencies in managing records is no exception. FileTrail enables several areas for improvement, the simplest and most significant is a reduction in the labor required to manage filerooms and hours spent on audit and inventory work due to explicit records visibility and tools that increase the productivity per fileroom employee. Clients are also able to reclaim office space from box/file storage due to being able to get files offsite faster and automating the interaction with the off-site records center. Lastly, due to localization capabilities and the global deployment options, FileTrail can be deployed as a system-of-record to drive cost reduction across the organization, rather than relying on varied, point solutions dispersed across different locations.

### *Unlock Value*

FileTrail allows your organization and approved users to “know what exists” in the volumes of paper files common to most organizations. Since FileTrail acts as the one system-of-record for all physical files, easy searches allow people to discover relevant items that they need, access them, and use them in their business or decision making process. This same principle extends to working with customers and partners, where access to previous work product and the ability to strictly control and validate their information is a key priority.

FileTrail unlocks value for the record staff by providing them with a global view of all records services (pickup, retrieval, overdue items, etc.) and records volume details allowing them to create staff and departmental plans to serve the needs of the company based on current and expected growth.

## **Why FileTrail**

For over a decade, FileTrail has focused on providing the best physical records management solutions to the market. FileTrail RM is a purpose-built application that reflects the needs of real physical RM business processes, with end-to-end capabilities exposed to users in a way that supports their work. FileTrail supports the file room and records personnel by giving them tools to efficiently find files, automate interaction with commercial records centers, and streamlined tasks and picklists. The same solution helps front office personnel efficiently find and leverage the information they need to make decisions that drive the business forward. All this on the world’s most advanced physical records management architecture, assuring full reliability, advanced options (such as RFID) and interoperability across any client environment.

## **Contact Us**

For more information on FileTrail Records Management, please contact us at 800.310.0314, or visit us online at [www.filetrail.com](http://www.filetrail.com)

## **FILETRAIL TECHNOLOGY**

FileTrail combines progressive technologies and professional development to provide robust solutions that maximize process improvement.

Our solutions have been completely browser-based since 2001. Development in Microsoft .NET 4.0, AJAX and Javascript provides enhanced usability, serving pages faster and providing a smoother experience, while session authentication and other security methods protect the transaction. Real-time integration provides access through 3rd party applications that your staff are already using.

# **FILETRAIL®**

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