

## FileTrail's Space Management

### Define Facilities and Services

FileTrail allows you to identify each building or room separately, based on staffing. This allows requests to appear on the dashboard of staff responsible for the facility in which the records are stored. In addition, you can define what services will be provided. Services like pickup and retrieval are standard but, you can also define other services that can be requested from a records center, such as scan-on-demand, copying a record, faxing a record, etc.

### Easily Mirror Shelf Configurations

The growth of a corporate records center tends to result in a variety of shelving acquired over a period of years. Often, different types of shelving have different configurations—different number of stacks or shelves, or different capacities. In addition, individual shelves may be removed to accommodate different media or miscellaneous odd-size boxes, or encumbered by the need for a pass-through, HVAC ductwork, etc.

FileTrail accommodates varied shelving by allowing you to define multiple configurations within each facility. Within each configuration you can define a hierarchy of levels using your terminology e.g. row, aisle, stack, shelf, slot, etc., the range of each level e.g. A thru G, 01 through 68, etc. Exceptions are easily handled by the ability to individually eliminate shelves or alter the capacity.

FileTrail provides advanced shelf configuration that allows you to define a range with both a long name and short name. The facility name and short name acts as a sort order for pull lists and re-file lists, to ensure efficient processing in a single pass through one or more rooms or buildings. Setting a verb value ensures a perfect description of the location, as in:




**On Shelf A-17-C-3, In Cabinet 23, Drawer 4**

### Location By Shelf in Your Records Center

FileTrail uses a concept called “home location” to automate return of records. The home location is used with the record’s home file room and assigned storage facility to create the re-file instruction—an English-like statement of what to do with a record to get it back to its home.

By including defined shelving in the home location concept, FileTrail helps you manage records in your records center.

**Example: A file checked out to a user**

**Current Location:** Out to  Mary Jones   
**Re-File Instruction:** In  Box 23242342, At Building A17,  
 On Shelf A-17-B-6

The shelving designation is leveraged in the sort order on pull lists to allow retrieval of requested records in a single pass through the facility. It is also used as the sort order on re-file lists to allow return of records to their home location in a single pass through the facility.



Organizations that manage their own records center can add space management capabilities to their FileTrail solution. This module automatically allocates shelves to items, tracks free space within the records center, and reports activities for charge-back. As a result, your records center can be run more effectively with less labor, while providing better service to the organization.

### Powerful Configuration

With FileTrail Space Management, you can set up and manage inactive storage whether it is one large room, multiple floors, or multiple buildings in multiple cities. And, you can do it in any language, thanks to FileTrail's *language localization*.


Once configured, the location of a box will appear in a sentence-like statement:

**In Building A32  
 On Shelf: 3-G-09-7**

or

**In Building A32  
 On Floor 3, Row G, Stack 09, Shelf 7**

The location of a folder will appear to the end-user in a sentence-like statement:

In  Box 23423423 In Building A32  
 On Shelf: 3-G-09-7

or

In  Box 23423423 In Building A32  
 On Floor 3, Row G, Stack 09, Shelf 7

With FileTrail Space Management, you can print a bar code for each shelf location. Assigning boxes to a location is easily done with a portable scanner using the shelf barcode and box label barcodes.

The home location changes throughout the records lifecycle. During active circulation, a record's home location is going to be a file room or a specific shelf or file cabinet drawer. As files are boxed their home location becomes the box itself.

When boxes are sent to your records center, that facility becomes the home location for the boxes. Prior to being shelved, it may be checked out to a pending or waiting area. Then, as boxes are tracked to a specific shelf location that shelf becomes the home location for the boxes.

### Manage By Permanent or Dynamic Location

Records can be managed in your records center using either a *permanent location* or a *dynamic location* scheme. Under *permanent location*, the box is always returned to its home shelf. The home location on the re-file lists helps your staff efficiently return records to their permanent home location.

In contrast, the *dynamic location* scheme allows you to store boxes in any location that is convenient or best for the expected activity level of the box. This means that when a box that has been retrieved is returned, it will be placed in a convenient location rather than its original home shelf. FileTrail accommodates this by resetting the home shelf whenever you scan a box to a shelf.

### Comprehensive Features

With FileTrail Space Management, you can easily manage your long-term storage facility using a comprehensive set of space management features. Using the FileTrail Space Management you can:

- ▶ Find consecutive available space, based on your need for a number of locations for a specific media.
- ▶ Define shelving locations using alphabetic or numeric ranges within levels with meaningful names that you assign.
- ▶ Extend existing definitions if a rack is heightened or new rooms, floors or buildings are added to your Records Center.
- ▶ Specify that a shelf location is not available when, for example, space is needed to store equipment or other non-records items.
- ▶ Design and print bar coded labels to uniquely identify each shelf location.
- ▶ Change the capacity of a shelf location to accommodate exceptions like an HVAC duct or pass-through.
- ▶ Automate tracking records with bar coding by scanning a shelf bar code and bar codes on the box labels to assign boxes to shelf locations.
- ▶ View a list of records that are assigned to a specific shelf location.
- ▶ Summarize total available capacity.

### Key Features and Benefits

With FileTrail Space Management, you get the most configurable and comprehensive space management capabilities for your Records Centers, including the ability to:

- ▶ Find consecutive spaces to accommodate boxes being received.
- ▶ Define shelf locations with level-names that you assign.
- ▶ Extend shelf locations when new rack or facilities are added.
- ▶ Disable shelf locations when spaces are needed for non-record use.
- ▶ Design and print bar code labels for shelf locations.
- ▶ Alter capacity of a shelf location to accommodate exceptions
- ▶ Assign shelf locations to boxes using bar coding on a portable scanner.
- ▶ View a list of records that are assigned to a specific shelf location.
- ▶ Summarize free capacity.

### Best Practices Delivery

FileTrail tailors training sessions based on your staffing and facilities. These classes help you realize the full potential of your FileTrail solution, maximize the level of service and responsiveness to your customers, and achieve the best returns on your IT investments.

With more than 20 years experience with archival records storage and warehouse management, we know how to create an efficient records center. This experience, coupled with unique insights into our products and technology, positions FileTrail to help you implement best practices in your operations.

### About FileTrail

FileTrail, Inc. is the leader in Web-based records tracking and management solutions. Companies of all sizes turn to FileTrail to streamline processes with the latest technology and most configurable software. Headquartered in San Jose, California, FileTrail has been providing records management solutions to clients since 2001.