

**Complete Records Management**

# FileTrail for SharePoint®

Bringing Physical Records Management and RFID to SharePoint.



## For the First Time, You Can Now....

- ▶ Manage physical records in SharePoint
- ▶ Have an integrated view of physical and electronic records in SharePoint
- ▶ Quickly add out-of-the-box physical records management to any new or existing Document Library
- ▶ Use built-in SharePoint Legal Hold and Retention tools on both physical and electronic records
- ▶ Gain real-time tracking with RFID technology in SharePoint

FileTrail for SharePoint adds complete physical records tracking and management to SharePoint. This allows organizations to access and manage both their electronic and physical records through a single integrated solution. Finally, organizations can leverage SharePoint compliance, workflow, and search tools for all their records.

### SOLUTION HIGHLIGHTS

#### Integrated View

SharePoint provides access to electronic documents. By adding FileTrail for SharePoint, users gain an integrated view of both physical and electronic documents. Your Document Library views show both physical and electronic records without requiring any modification.



*All staff gain an integrated view of physical and electronic records.*

#### Native SharePoint Functionality

SharePoint includes functionality to take actions on electronic records. By adding FileTrail for SharePoint, the built-in legal hold, retention, disposition, workflows, and security (IRM) applies to both physical and electronic records.

#### Physical Records Functionality

FileTrail for SharePoint extends the functionality of SharePoint, adding tools specifically for physical records. Within SharePoint users can see current location, request retrieval, and more. Staff who send records to archives can create new boxes, fill boxes with folders, and stage for pickup. Records managers gain control over offsite transmittals and pickups, and can manage in-house file rooms and records centers. Users can print bar coded labels for new files and boxes, or use pre-printed bar codes. Color coded labels can be printed to match your existing standard.



*Color-coded end tab labels and bar code labels print from the SharePoint user interface.*

### User Capabilities

- Staff continue to use their SharePoint Document Libraries without disruption.
- Localize to any language you need.
- Automate operation and management of file rooms and records centers.
- Integrate with commercial records centers to simplify retrieval and transmittal.
- Streamline tracking with bar coding color-coding and RFID technologies.
- Find physical records quickly, like using a metal detector, with the RFID FileDetector™.
- Automatically track physical records with FileTrail's SmartOffice™ RFID technology.

#### Federated Retention

SharePoint provides tools to automate retention and disposition of electronic records. Now with FileTrail for SharePoint, your retention policies, legal holds and workflows are applied to both physical and electronic records without requiring any modification.

## Key Benefits

- Users use the same familiar SharePoint interface to access and work with physical items. The built-in SharePoint tools are applied to both physical and electronic items.
- Minimizes business risk by documenting compliance with prevailing laws and regulations for all records.
- Applies to existing SharePoint Document Libraries without disrupting items or other applications.
- Maximizes efficiency by automating physical records-related processes for all staff.
- Localized to provide users with native language, time zone, and date/time format.
- Accelerates business processes to improve responsiveness to customers.
- Automates physical records management from creation and labeling to archiving and retrieval.
- Staff can find the location of a physical record without leaving their desk. Request tools replace wasteful trips to the file room.

# FILETRAIL®

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## Integrated Search

SharePoint provides search tools to allow users to quickly access electronic records. With FileTrail for SharePoint, users see integrated results for both physical and electronic records. Your standard and customized text searches, filters and views include both physical and electronic records without requiring any modification.

## Scalability and Management

SharePoint provides tools to allow centralized management of content across all Site Collections in your entire farm. FileTrail for SharePoint can leverage SharePoint's Managed Metadata Service and Content Type Syndication. This allows you to apply unified physical and electronic taxonomy and policy implementation for the enterprise from a single interface. Our unique architecture allows you to implement any records management design, knowing that it will work for physical records.

## RFID Tracking Technology

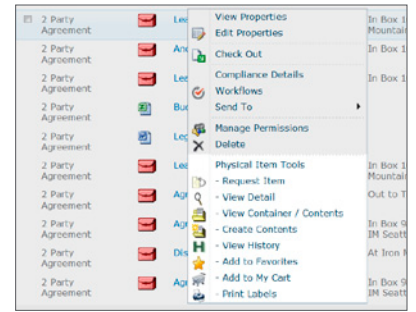
FileTrail's SmartOffice™ RFID technology adds the power of RFID to SharePoint. FileTrail is the leading provider of RFID for the office environment, with more coverage in carpeted space than any other vendor. Your RFID solutions could include one or more key capabilities:

- Locate misplaced items quickly like a metal detector with an 8-foot read distance using the portable RFID Detector™.
- Cut the time to complete physical inventories by 80% or more using the portable Audit tools.
- Automate tracking with RFID sensors in the ceiling, under desks and in doorways, without the need for staff compliance.
- Prevent unauthorized removal of physical records, assets, equipment, and more, using a combination of lights, alarm, and email alerts with RFID sensors at exits.

## True Integration

FileTrail for SharePoint leverages Content Types in SharePoint 2010 to add physical items to SharePoint. Physical Records Management functionality is enabled through FileTrail's Physical Item Content Type, which inherits from the built-in Document Content Type.

FileTrail's Content Type architecture leverages your previous and future configuration in SharePoint. It allows all of the SharePoint 2010 platform tools to be used on physical items just as they are for any other document in SharePoint. As a result, physical and electronic documents appear together in Document Libraries, and share the same metadata, taxonomy, workflows and retention. In addition, customization of physical item functionality is done primarily using the built-in tools in SharePoint and SharePoint Designer and not in 3rd party tools.



*Special functions for physical records appear on the context menu, allowing users to request retrieval, view location history, and more.*

Physical Item Activity		
<b>Item Activity</b>	<b>Request Fulfillment</b>	<b>Archiving</b>
Overdue Items 6	Check Out Requests 5	Order Retrieval 8
Missing Items 1	Creation Requests 2	Receive Retrieval 1
	Pickup Requests 5	Stage for Archives 1
	Task Requests 2	Order a Pickup 3
		Transmit to Archives 2

*File room operations and interaction with off-site records storage is automated and monitored on the physical items activity dashboard.*



*FileTrail's RFID SmartMobile helps you find critical files like using a metal detector.*