

“FileTrail is an integral part of the DVA's electronic processing.”

Case Study

Sue Freeman
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UK Ministry of Defence



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Agency Centralizes Operations With FileTrail

Client Profile

Headquarters: York, UK

Industry: Government

FileTrail Implementation: 2009

FileTrail Products Implemented

- **FileTrail Professional** - Complete file tracking and records management automation with RFID technology.
- **FTAuthenticate** - Single sign-on authentication using Windows, Active Directory, or 3rd-party authentication.
- **FTMobile™** - Portable scanner application that allows files to be checked-in, checked-out, transferred and boxed without being tethered to a workstation.
- **FTSynchronize™** - Loads and updates data from upstream resources to keep FileTrail data synchronized and up-to-date with authoritative systems.

<http://www.FileTrail.com>

Background

The Defence Vetting Agency (DVA), located in York, was created when the separate Vetting Departments of the Royal Navy, the Army, the Royal Air Force and the Ministry of Defence were brought together into a single entity.

The combination of these Departments created a filing system complicated by the fact that each service had an entirely different indexing system. It became clear to management that a comprehensive records management and tracking software system would be essential to control this very large and varied filing system.

Solution

FileTrail was selected in a public bid process. One reason is because FileTrail is extremely flexible and easily configured to fit the exact metadata desired. FileTrail is also 100% browser-based and does not require installation at the desktop.

“FileTrail is an integral part of the DVA's electronic processing,” said Sue Freeman, Manager for DVA. “Without it we would have to track upwards of 400,000 hard copy files manually within the DVA and to and from our customers — a mammoth task requiring considerably more than the current number of library staff.”

Request and Retrieval Eliminates the Walking Payroll

FileTrail provides powerful search and request tools at every desktop. Staff save time by identifying needed files and placing requests for them without leaving their desks. Requesting specific files from FileTrail's inventory eliminates the inefficient process of emailing back and forth about needed/available items.

The FileTrail application is accessible from any of the over 200 workstations across the DVA. Because FileTrail is completely browser-based, there was no need to install software on any of the workstations.



System Requirements

FileTrail is browser-based, requiring no installation at the desktop for normal use. Some desktop installation is required for functions that use peripherals, such as printing labels or downloading portable scanners.

Web Server:

- OS: Windows Server 2003/2008
- MS .Net Framework 3.5

Database Server:

- SQL Server 2000/2005/2008
- Oracle 9i/10g/11g

Workstations:

- IE 6/7 or FireFox 2/3/3.5
- For Label Printing:
Java Runtime Environment 6
- For Portable Download:
MS Active Synchron 4.8
MS .Net Framework 3.5

About FileTrail

FileTrail, Inc., is the leading provider of web-based business records automation, including file tracking and records management solutions. FileTrail helps agencies of all types implement and enforce standardized processes in handling paperwork, documenting compliance, and managing workflow, providing a fast-track to “best practices”. With FileTrail your agency responds faster and more reliably to internal and external clients, contributing to higher customer retention that is important in today's economy.

FileTrail is the leader in UHF RFID for records handling and tracking. FileTrail's RFID technology brings additional timesavings to managing paperwork including passive tracking, securing exits, and locating critical files using the FileDetector™. FileTrail's clients span over forty industries on four continents. Based in San Jose, California, FileTrail has been providing solutions for records management since 2001. Visit us at www.FileTrail.com.

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The search tools allow a user to search for a file using as much or as little information as they have available. From the results, users can view data, the current location and add files of interest to the “shopping cart” to request them in a batch.

Requests appear in FileTrail in the file room. The sort-ordered pull list allows staff to pull all requested files in a single pass through the file room. The delivery list is sorted by the requestors' desk locations — building, floor, and office number — to facilitate efficient delivery in a single pass.

The time savings that result from FileTrail's search and request tools often change perspectives. It may not be the physical value of the files, but the importance of finding a file at the right time which matters most.

Powerful Research in the Audit Trails

Another key benefit of FileTrail is the transaction logging that provides valuable information during internal or external audits. Every movement is recorded in a location audit trail. In addition, each edit to metadata is logged in another audit trail. Both audit trails are easily viewed showing what, who, and when, and ensuring that users are accountable for their activity in FileTrail.

The Technology for Tracking

FileTrail leverages barcode technology to automate tracking. All tracking transactions — check-in, check-out, etc. — can be done in batch, significantly reducing the time to process dozens of files at once.

FileTrail also leverages RFID technology as either a replacement or supplement to barcoding. RFID uses radio waves to read the tags on files. This allows batches of files to be read at once without needing to individually handle each file.

In addition, placing sensors under desks, in the drop-ceilings and in doorways automatically tracks the files as they move.

A Single Solution for Tracking

The success of the initial FileTrail project for the DVA to manage vetting files has led to additional uses. FileTrail is being expanded to track other vital files.

FileTrail was designed with the flexibility to be the only tracking solution an organization ever needs. The ability to define any number of categories, media, levels of security and user-defined screens makes this possible.

“The installation and ongoing support has been excellent,” said Freeman.



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