



RECORDS MANAGEMENT

Full Lifecycle Physical Records Management for the Legal 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.	Integrate disposition review and approval, legal holds, and client-specific policies for compliance with OCG.	Print labels with barcodes, color-coding, and RFID with the integrated label designer.	Simplify tracking, auditing, and pulling for request fulfillment and destruction on Android devices.	Simplify your workday with background exchanges with archival vendors and upstream sources for data.

PAPER LITE

FileTrail is helping clients keep fewer paper records by:

- ✓ Applying uniform retention policies to destroy records on schedule and minimize paper storage.
- ✓ Using scan-on-demand requests to efficiently support remote workers.
- ✓ Using our Web Services API that allows third-party scanning to store electronic documents and destroy physical records.
- ✓ Storing reference-only documents with searchable content in lieu of an EDMS.

POWERFUL REPORTING

FileTrail provides powerful reporting tools:

- ✓ Ad hoc reporting wizard: Non-technical users can design their own reports.
- ✓ Trend reports: Show activity over time with easily configured into graphical reports.
- ✓ User-defined dashboard: Arrange favorite reports and graphs according to user needs.
- ✓ Background downloads: Large reports run in the background and alert the user when complete.
- ✓ Report sharing: Share reports with users/groups, allowing them to run reports without assistance.

KEY AREAS OF FOCUS



ACTIONABLE DASHBOARDS

FileTrail's dashboards present graphical reporting and actionable metrics that alert and guide the user 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

FileTrail's modern design and simple UI allows users to easily adopt FileTrail. Personalization allows saving of favorite searches and reports 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, and the EU 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. 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 EXISTING SYSTEMS

The exceptional configurability of FileTrail — unlimited user-defined fields and user-defined screens for different types of records — makes it easier to migrate existing data by conforming FileTrail to that 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 existing systems including LegalKEY™, ARM, Filesurf, iRIMS™, Accutrac™, Elite™ RM, Aderant® RM, Access, FileTrack, Infolinx®, Tab, Smead, Versatile™, Stellent™, and other data sources.

OUR CORE VALUES SERVE YOU

CUSTOMER FOCUSED	CONFIGURABLE	EASY UPGRADE	SUPPORT	MIGRATION PATH
Customers love FileTrail because we listen and build software that works the way people work.	Easy configuration to perfectly fit the customers file plan using unlimited user-defined fields, searches, reports, and more.	Easy application of new releases lets customers take advantage of our customer-focused continuous improvement.	Context-sensitive help can be augmented by user-defined help to minimize the need for external support.	Continuous improvement ensures that customers never find themselves in a dead-end product, falling behind in technology.



BOOST PRODUCTIVITY

Give file room staff 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

Deploy an organized, purpose-built approach so requirements can be met without duplication of effort.



REDUCE RISK

Meet compliance regulations by automating policy execution and using actionable dashboards.



EFFICIENCY

Eliminate the time needed to locate information. Find records with no hassle.

MATTER-CENTRIC FUNCTIONALITY

FileTrail addresses the needs of the legal industry for functionality that revolves around a 2-level Client-Matter list. This list can also be configured as a single-level list for Matter or Docket, as needed.

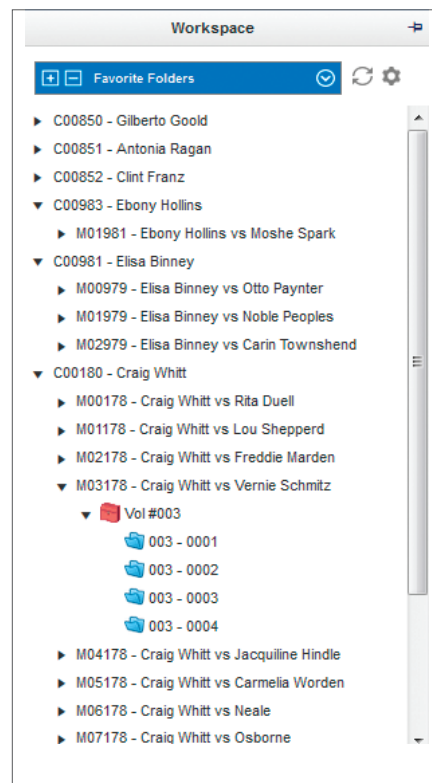
All functionality revolves around the Client-Matter list, including the Workspace, which provides access to physical records by client and matter. One or more physical records can be selected for use in transactions, exports, or reporting.

Integration with your financial system through Intapp™ Intake or Integrate automatically adds new clients and matters in real time. Updates to matter information — such as close date, last billing date, timekeepers, and more — are automatically synchronized from Elite and Aderant. Security policies are synchronized from Intapp Walls or iManage™ SPM to uniformly apply ethical walls.

FileTrail further leverages the Client-Matter list in other modules that enhance or expand the scope of your FileTrail system, including:

- ✓ Applying legal holds to a client, matter, or individual records
- ✓ Approving disposition by matter or individual records
- ✓ Working with records and documents in lateral moves
- ✓ Identifying high-risk matters or risk levels of high-value clients

Further, UI integration with NetDocuments allows attorneys and staff to see what physical records exist, and even select and request retrieval of records.



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 iManage, NetDocuments, file shares, and other repositories.

FileTrail is the leader in information governance for legal and other highly regulated organizations in North America, the UK and the EU. FileTrail's automated solutions modernize records management and improve IG programs, reducing both risk and cost associated

with physical records, client file transfers, policy compliance and more.

Contact us today to learn how your firm can stay on track with FileTrail.
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