

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

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.

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

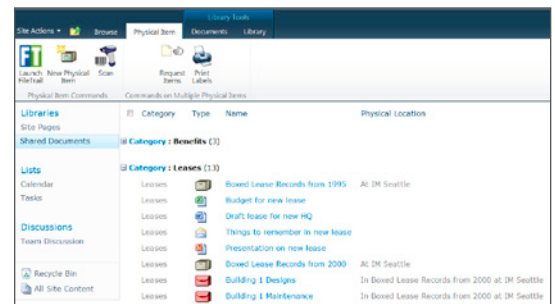
SharePoint provides access to electronic documents. By adding FileTrail for SharePoint, users gain an integrated view of both physical and electronic documents. Your Document Library views show both physical and electronic records without requiring any modification.

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.



Integrated view of physical and electronic records.

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.

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.

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.

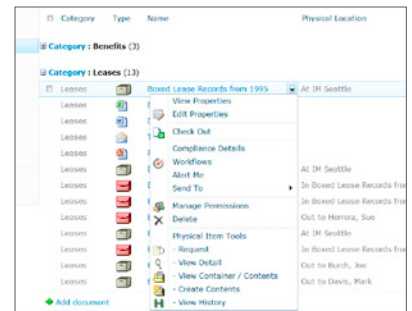
True Integration

Unlike other vendors that offer 'SharePoint integration', FileTrail for SharePoint is a true integration. Our approach allows you to use the built-in SharePoint tools for search, legal hold, retention, compliance, workflow and security on both physical and electronic items in the same action.

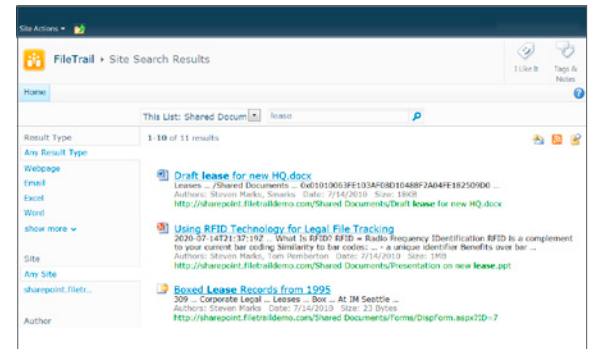
Be wary of solutions that only provide the window-dressings of integration. These simply provide views into their systems from SharePoint, screen mashups, or redundant synchronization of data (file plans, retention schedules, and policies).

Shortcuts to integration, like those mentioned above, can create inefficient duplication and the possibility of errors. Worse, it may indicate that tasks must be done in both SharePoint and another product. You may be required to do separate searches, or view results separately, for physical and electronic items.

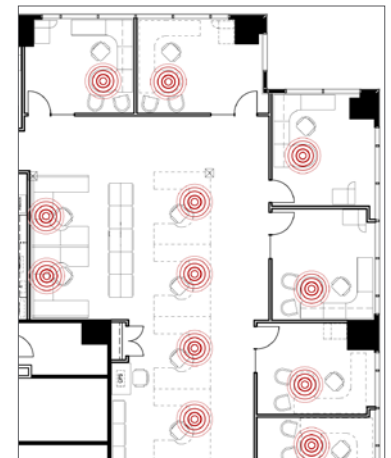
For best results, look for true SharePoint integration like FileTrail for SharePoint. This ensures one-step implementation and full use of built-in SharePoint functionality on both physical and electronic items.



Special functionality appears on the context menu for physical records to allow users to request retrieval, view location history, and more.



Physical and electronic records are returned by filters and text searches.



SmartOffice RFID technology automates tracking, streamlines audits, and helps locate misplaced items.

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