

FileTrail for SharePoint

Bringing Physical Records Management and RFID to SharePoint

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

Complete Records Management

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

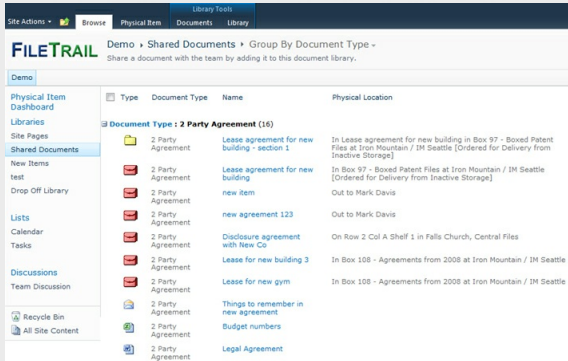
SharePoint includes functionality to take actions on electronic records. By adding FileTrail for SharePoint, the built-in legal hold, retention, disposition, workflows and security (IRM) applies to both physical and electronic records.

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 off-site transmittals and pickups and can manage in-house file rooms and records centres. Users can print bar-coded labels for new files and boxes or use pre-printed bar codes. Colour coded labels can be printed to match your existing standard.

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.



Type	Document Type	Name	Physical Location
2 Party Agreement	Lease agreement for new building - section 1		In Lease agreement for new building in Box 97 - Boxed Patent Files at Iron Mountain / IM Seattle [Ordered for Delivery from Inactive Storage]
2 Party Agreement	Lease agreement for new building		In Box 97 - Boxed Patent Files at Iron Mountain / IM Seattle [Ordered for Delivery from Inactive Storage]
2 Party Agreement	new item		Out to Mark Davis
2 Party Agreement	new agreement 123		Out to Mark Davis
2 Party Agreement	Disclosure agreement with New Co		On Row 2 Col A Shelf 1 in Falls Church, Central Files
2 Party Agreement	Lease for new building 3		In Box 108 - Agreements from 2008 at Iron Mountain / IM Seattle
2 Party Agreement	Lease for new gym		In Box 108 - Agreements from 2008 at Iron Mountain / IM Seattle
2 Party Agreement	Things to remember in new agreement		
2 Party Agreement	Budget numbers		
2 Party Agreement	Legal Agreement		

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



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 customised text searches, filters and views include both physical and electronic records without requiring any modification.

Scalability and Management

SharePoint provides tools to allow centralised 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.

Physical Item Activity		
Item Activity	Request Fulfillment	Archiving
Overdue Items	Check Out Requests 14	Order Retrieval 2
Missing Items 1	Creation Requests 15	Receive Archived Items 5
Items to Re-file 4	Pickup Requests 3	Stage for Archiving
Items to Transfer 1	Task Requests 6	Order a Pickup 4
		Transmit Archived Items 3

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 unauthorised 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, customisation of physical item functionality is done primarily using the built-in tools in SharePoint and SharePoint Designer and not in 3rd party tools.

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.
- > Minimises business risk by documenting compliance with prevailing laws and regulations for all records.
- > Maximises efficiency by automating physical records related processes for all staff
- > Localised to provide users with native language, time zone and date/time format
- > Accelerates business processes for all staff
- > 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

For more information on FileTrail for SharePoint, please send us an email at recordsmanagement@civica.co.uk or call us on 01604 798500.

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