



## Technology

FileTrail incorporates unique technology concepts and sophisticated features to provide the right records management solution for your organization. Powerful tools at every desktop automate manual processes, giving you control over corporate records and reducing costs each time records must be handled.

### About FileTrail

FileTrail, Inc., is the leading provider of webbased records management solutions. Companies of all sizes turn to FileTrail to streamline processes with the latest technology and most configurable software. FileTrail has been providing solutions to clients since 2001.

"The web technology is great because there is no client install required for users. This is great from a system admin point of view when making changes or upgrades."  
Mark Brashear, IT Support  
Duff & Phelps LLC - Chicago, IL

"FileTrail is the best-written software I have seen in 30 years of implementing systems."  
Hal Hubbard, Information Technology  
Korn Law Firm - Columbia, SC

"The browser interface is extremely easy to navigate. We can search our records in record time."  
Grant Smith, Corporate Legal Dept.  
Pfizer Inc. - St. Louis, MO

"FileTrail is fabulous! They helped us consolidate 6 different operations into a single, centralized loan vault. We now track and handle requests for over 100,000 loan files with a much lower operating cost."  
Linda Ceno, Loan Vault  
Mid America Bank - Chicago, IL

"The flexibility inherent in FileTrail gives us the ability to create custom fields to more accurately reflect the nature of our records."  
Joshua Teeple, CPA, CFE  
Director of Litigation Technology Services  
Grobstein, Horwath & Company LLP  
Encino, CA

"FileTrail saves us so much time because we don't walk around looking for loan files anymore. I can find any file without leaving my desk."  
Lisa Wickser  
Ameriquest Mortgage - Irvine, CA

### Web Technology

FileTrail's 100% PureWeb™ solution was developed from the ground up using current technologies. Our install-once technology provides rapid deployment officewide without installing software at the desktop.

### Highly Configurable

FileTrail's FTAdapt™ proprietary modeling technology allows your solution to conform to the hierarchy of your organization, various filing systems and across multiple locations.

### Enterprise Security

FileTrail allows you to assign granular security rights in accordance with standards set by DOD and HIPAA. This allows each department, file room, and office location to have the right level of interaction as appropriate.

### File Room Automation

FileTrail's MyFileRoom™ provides file room staff with an overview of their file room including pending requests, files to create, overdue items and more. Each link takes the user to a guided process for completing work that needs to be done.

### Department Automation

FileTrail's MyDesktop™ provides departmental staff an overview of their situation including pending requests, items checked out to them, overdue items and more.

### Active Naming

FileTrail logs the changing names of entities as synonyms and aliases, allowing you to painlessly retrieve all records in a search no matter which name (current or historic) that you know for your client, vendor, employee, patient, etc.

### Persistent Carts

FileTrail incorporates "persistent carts" to allow users to process tasks smoothly that involve working with many items over a period of time. Items placed in carts through creation, searching and scanning remain in the carts through interruptions and breaks until explicitly removed.

### Easy Importing

FTConnect™ provides configurable importing of data. Sophisticated mapping allows you to create and map import and update configurations to seamlessly exchange data with mission-critical systems.

## ***Synchronization***

FTSynchronize™ provides configurable unattended synchronization with upstream systems. Sophisticated mapping allows loading of new data, and updating of existing data as changes occur on systems that originate data.

## ***Archiving Automation***

FileTrail automates communication with your commercial records center, eliminating transmittal forms, emails, faxes, etc.

## ***Field-Level Locking***

FileTrail's unique data locking architecture permits several users to edit different fields of the same record simultaneously, allowing work to continue without delays and preserving the changes made by each person.

## ***PowerPick***

FileTrail's PowerPick tool allows users to quickly search through long lists. This is ideal for selecting from a long list of projects, clients, client-matters, vendors, etc.

## ***Multi-Office Architecture***

FileTrail was specifically designed to simplify operations for organizations with operations in multiple buildings or multiple cities, providing local, regional or national levels of control.

## ***Filing Environments***

FileTrail supports each file room or filing area with functionality specifically created for central file rooms, open file rooms, departmental filing and decentralized filing.

## **TECHICAL REQUIREMENTS**

### **Server Requirements:**

**Server OS:** *Windows 2000/2003 Server*  
**Database:** *MS Access 2000™*  
*or*  
*MS SQL Server™ 2000*  
*or*  
*Oracle 9i (Release 2)*

**Software:** *IIS™ 5.0 or newer,*  
*sessions enabled*  
*Microsoft® Windows Script 5.6*  
*or newer*  
*Microsoft® .NET™ Framework 1.1*

### **Workstation Requirements:**

**Web Browser:** *Microsoft® Internet Explorer™*  
*5.5 or newer*  
*or*  
*Netscape® Communicator™ 6.0*  
*or newer*  
*or*  
*Firefox 1.0 or newer*  
*Cookies and JavaScript enabled*  
*Popups enabled*

**Other Software:** *Microsoft® ActiveSync™ is required*  
*for FTMobile portable scanning*

*Java 2 Runtime is required*  
*for label printing*



### ***Corporate Offices***

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