



# Manage Records and Governance with Precision and Ease



FileTrail is a modern, comprehensive data governance solution trusted by the world's leading law firms, that automates and secures every stage of your records lifecycle and allows you to manage your physical and digital records precisely and efficiently. FileTrail helps law firms significantly reduce their exposure to risks, including those relating to attorney mobility, client audits, and compliance with outside counsel guidelines (OCGs).

## Why FileTrail?

Compliance is transformed into a seamless part of your daily operations, ensuring effortless alignment with internal policies, governmental regulations, and OCGs. FileTrail streamlines lawyer transitions through quick and accurate file transfers. The result is a dramatic reduction in costs and marked improvement in client service.



### The modern physical and digital data governance solution

Enhance governance and security with the ability to view, manage, secure, and move physical and digital data at a client and matter-level.



### Automated end-to-end record management

Easily manage the retention, disposition, and visibility of all records. Transfer client files quickly and correctly.



### Reduce risk, control costs, and improve client service

Automate compliance with internal policies, government regulations, and OCGs. Onboard lawyers efficiently.



BAKER DONELSON



CLIFFORD  
CHANCE

DORSEY  
DORSEY + WHITNEY LLP



Milbank



Simpson  
Thacher

OSLER



## Key Features

### ✓ **Powerful Matter Profile**

The Matter Profile exposes policies related to security, retention, and OCGs, while unlimited user-defined fields accommodate each firm's unique needs for searching and reporting. In addition, the Matter Profile provides access to timekeepers, billing attorneys, and responsible attorneys, simplifying communication.

### ✓ **Clear Progress Visualization**

FileTrail displays progress on key workflows, allowing you to escalate issues before they develop in disposition reviews, mobility actions, and risk.

### ✓ **Graphical Budget Forecasting**

FileTrail's forecast reporting allows you to budget for disk storage and vendor fees years in advance. These reports, along with other graphical reports, can be added to your Reports Dashboard, providing one-click access to the metrics that are important to you.

### ✓ **Adaptable to Your Evolving Needs**

FileTrail accommodates unlimited user-defined fields for Items and the Matter Profile on an unlimited taxonomy. This enables a perfect fit for your firm, and the ability to adjust to changing needs without relying on internal IT or incurring additional vendor fees.

### ✓ **On-Demand Compliance Reporting**

Respond instantly to client audits with reporting that automatically includes all data and activities from secure audit trails. With FileTrail, law firms can quickly act on and manage information requests during the audit process.

### ✓ **Deep Integration**

FileTrail provides comprehensive governance through deep integration within your information environment and enforces governance without moving document content. Connectors automatically inventory and apply approved actions, such as disposition and retrieval, to the documents across all repositories.

*“For users, the simplicity of the interface makes it very appealing and intuitive. For administrators, its security, configurability, and ability to scale to index, manage and report on the status of millions of records were all critical factors in the decision to choose FileTrail.”*

**Clifford Chance**

Click here to [Request a Demo](#) and see FileTrail in action.