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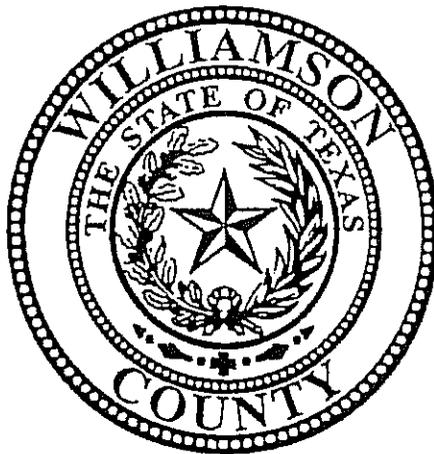## ...because Paper Happens®

Response to
RFP # 08WCP703

Radio Frequency Identification File Tracking System for Williamson County Clerk's Office

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111 N. Market Street, Suite 715
San Jose, CA 95113-1108
Phone: 408 289-1300
www.filetrail.com

November 13, 2007

RE: RFP # 08WCP703

We are pleased to submit our proposal in response to RFP # 08WCP703, for a Case File Tracking System.

FileTrail is the leader in RFID tracking solutions. We combine our browser-based application, expertise in RFID technology, and WebService integration tools to solve item tracking and management issues for organizations large and small.

Our customers rely on our intuitive software, well-designed processes, and automated integration to save money, reduce loss, standardize practices, gain control, and demonstrate compliance.

Everything we do is based on the recognition that each customer is unique. We provide our customer with the tools and best practices to implement high-accessibility solutions that benefit all staff across the organization. Our powerful configuration tools ensure that FileTrail works the best way for each customer and empower them to make changes without programming.

Our focus on our customers' results has helped us build a prestigious customer list made up of organizations recognized as leaders in their industries, who depend on FileTrail to save time, reduce costs, increase control and ensure compliance.

FileTrail is headquartered in San Jose, CA, in the heart of Silicon Valley. From there we serve clients across three continents. Our official contact is:

> FileTrail, Inc.
> 111 North Market St, Suite 715
> San Jose, CA 95113
> Phone: 408 289-1300
> Fax: 408-293-5357

Please feel free to contact me directly with any questions about this response at:

> Jonathan King
> (408) 289-1300 x304

Thank you for your time and consideration.

Sincerely,

Jonathan King

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1. COMPANY PROFILE

Background

FileTrail, headquartered in San Jose, California, was formed in 2000, and incorporated in 2001, from the merger of two companies. Both were integrators of file tracking and records management solutions.

FileTrail was created from the shared vision of a different type of software publisher. At that time, the industry was comprised of Windows applications, produced by small companies, whose products were poorly-designed, poorly tested, and lacked flexibility.

The founding vision was to create a software company that produced high-quality solutions that were highly-configurable, and that responded to customer needs and ideas quickly.

Our success is founded in the success of our clients. Our clients love the FileTrail application and we have a 100% success rate in project implementations. Many of our clients have expanded their initial solutions to include different types of items.

The success of our initial vision is demonstrated by the diversity of our client base, covering 3 continents in 47 industries, and ranging from very small (a 15-person law firm) to organizations with thousands of users and millions of tracked items like Quicken Loan and Marsh USA.

The configurability of our solution is demonstrated both by the diversity of our clients, and by complex clients with extreme needs. Amgen tracks and controls access to 200 types of FDA-auditable documents with FileTrail. Investco tracks and manage files for 205 organizational units with FileTrail.

Expertise

FileTrail's expertise is strongly tied to a core understanding of the processes used to handle and process paper-based documents. At our formation in 2000, founding members were responsible for implementation of, or development of file tracking software used by over 1,000 clients.

Since then FileTrail has expanded its expertise to include RFID technologies. Beginning in 2002 we implemented HF RFID solutions in government, law firms, and banks. The HF technology did not achieve widespread adoption because of the high cost of tags ($1 and up) and the short read-range (maximum ten inches).

Since the announcement of initiatives in UHF RFID in 2003, FileTrail has taken a leadership position in the use of RFID for file tracking and records management that has allowed us to provide a unique and valuable offering to our clients:

- Our RFID Middleware is the only RFID middleware created for file tracking.

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- FileTrail is the only file tracking application using Gen 2 RFID.
- Our file tracking user interface is the only browser-based solution.
- Our automation includes time-saving functionality for:
  - pulling for calendar
  - search and request
  - request fulfillment
  - graphical mapping of file locations

Experience

FileTrail RFID Tracking Solutions save time and money, and bring a new sense of calm to your office.

FileTrail RFID technology provides continuous, automatic tracking as files move from desk-to-desk and office-to-office using RFID technology. Automatic tracking means no action is required from staff, eliminating the staff compliance issue. Files virtually tell the database where they are as they enter an office or cubicle.

FileTrail provides intuitive, time-saving tools for staff at every desk. Simple search tools provide instant access to the current location and location history for any file. Additional tools streamline requesting, labeling, and other routine processes, saving time, applying standards, and reducing error.

FileTrail incorporates the latest RFID technology – a standard called "Gen 2" that operates at the 915 MHz frequency. This is the same technology utilized by large retailers and grocers to track and manage billions of dollars worth of inventory.

Gen 2 is completely safe for the office environment – recall that many cordless phones operate at 900 MHz. Also, all Gen 2 hardware is FCC certified as safe. And Gen 2 will not interfere with other office technologies, such as wireless LAN, RF security systems, wireless headsets, cordless phones, etc.

FileTrail has great experience implementing systems in hundreds of organizations. This experience includes expertise in both HF (13.56 MHz) RFID technology and GEN 2 UHF (915 MHz) technology.

We are recommending the Gen 2 915 MHZ technology for your application. This is the same system we have implemented at the Superior Court for Stanislaus County in CA and are in the process of implementing in Superior Court for Kings County in California, St. Charles Superior Court in Missouri, and Chatham County, GA.

The Gen 2 technology offers greater benefits. Some of these include longer read ranges for the tags, less expensive tags and no proprietary technology. The Gen 2

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technology was developed for the WalMart stores but has been implemented in many different solutions.

Other organizations that we have implemented include The ARMY Corp of Engineers, The Treasury Department, The Brotherhood of Electrical workers and many others.

FileTrail is also very experienced at converting case files to RFID. This has included cataloging and tagging large collection of files. Earlier this year we had a crew of seven on site at the 7th Judicial Circuit Court of Maryland converting 25,000 case files to RFID for our system.

Project Staffing

Tom Pemberton

Project Role:	Technical Project Manager
Project Responsibilities:	Responsible for configuration of integration with external data sources.
Relevant Experience:	Tom has 16 years experience in automating file tracking and records management. He has been with FileTrail for seven years.
Location:	Washington, DC
Telephone:	202 557-1013

Shane Sheridan

Project Role:	RF Installation Engineer
Project Responsibilities:	Responsible for installation and configuration of RFID hardware and RFID-related applications.
Relevant Experience:	Shane brings great experience from his construction background. He has performed large-scale RFID installations and client-site projects with FileTrail since 2005.
Location:	San Jose, CA
Telephone:	408 289-1300 x 301

Mimi Phommachakr

Project Role:	Solutions Trainer
Project Responsibilities:	Responsible for on-site training of end-users.
Relevant Experience:	Mimi came from the technical customer support industry and has been providing training and client services with FileTrail since 2004.
Location:	San Jose, CA
Telephone:	408 289-1300 x 305

Jamie Richgels

Project Role:	Sr. Systems Engineer
Project Responsibilities:	Responsible for development and implementation of server and application software.
Relevant Experience:	Jamie has ten years experience in systems implementation and software development. He has worked with FileTrail for six years, and held positions previously with Arthur Andersen and Accenture.
Location:	Washington, DC
Telephone:	202 545-3984

Jon Kato

Project Role:	Project Specialist
Project Responsibilities:	Responsible for non-technical configuration of the FileTrail application and coordinating hardware deliverables.
Relevant Experience:	Jon has worked with FileTrail for three years in various product- and client-related roles including configuration, support, and administration.
Location:	San Jose, CA

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Telephone:	408 289-1300 x 303

Communication will be handled through the Project Manager. Also see statement of work.

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PERFORMANCE HISTORY/REFERENCES

ALL PROJECTS LISTED BELOW ARE STILL UNDER CONTRACT FOR MAINTENANCE AND SUPPORT.

Sughrue Mion, PLLC

The law Firm of Sughrue Mion, PLLC, has been a FileTrail client for a few years. While the environment and scale of this solution differs from RFP #7101000142, this client is a worthy reference for a few reasons. First, this is one of the few instances where the value of RFID has been strongly demonstrated – a weekly audit process was reduced from 32 hours to 4.5 hours using FileTrail RFID. Also, Integration with their Docketing system triggers printing of color coded labels and creation of new files. Project began in 2004.

Ms. Jody Rosenberg

Phone: 202-293-7060

Email: jrosenberg@sughrue.com

Prince George's County, 7th Judicial Circuit Court

The 7th Judicial Circuit Court has just implemented a system similar to that required by RFP #7101000142. Case file tracking is automated with RFID at over 130 locations, comprised of clerks' cubicles, courtrooms, chambers, offices, and other points. Integration with their case management system downloads new and updated case data on a nightly basis. Project began in 2006.

Ms. Joretta Meyer

Phone: 301-952-4140

Email: jlmeyer@co.pg.md.us

St. Charles County Courts, Missouri

The Courts of St. Charles County, Missouri, just implemented a system almost identical to that required by RFP #7101000142. Case file tracking is automated with RFID at 28 locations (with additional 15 to 20 in each of Phases II and III), comprised of clerks' cubicles, courtrooms, chambers, offices, and other points. Integration with their case management system downloads new and updated case data on a real-time basis. A portable RFMobile tracker will help locate missing files. Project began in 2006.

Mr. Roger Steele

Phone: 636-949-7900 x5551

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Email: roger.steele@courts.mo.gov

Stanislaus County Superior Court

The Superior Court of Stanislaus County, California, has implemented a system similar to that required by RFP #7101000142. Case file tracking is automated with RFID at over 100 locations, comprised of clerks' cubicles, courtrooms, chambers, offices, and other points. Integration with their case management system downloads new and updated case data on a nightly basis. Project began in 2007.

Ms. Jeanine Tucker

Phone: 209-525-7703

Email: jeanine.tucker@stanct.org

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PROJECT APPROACH AND SCOPE OF SERVICES TO BE PROVIDED

Note: Completion dates and major task timelines used to assist in the planning and tracking of this project can only be estimated after further discussions between FileTrail and Williamson County project managers.

PROJECT APPROACH

Work Plan and Methodology

FileTrail's project methodology reflects our core goals:

- o 100% referencability among our client base.
- o Application of "Best Practices" in our client's operations.
- o A smooth transition and thorough training for staff.
- o Minimal system downtime in the final migration to FileTrail.

FileTrail has developed FSM – the FileTrail Structured Methodology – to provide structure and guidance to our clients during the implementation of their FileTrail Solution. FSM integrates selected techniques and tools into a consistent and unified approach to achieve consistent success while integrating the uniqueness of each client into their own FileTrail configuration.

FSM was designed specifically to guide staff through to completion of the project, while ensuring that the FileTrail solution is leveraged to its fullest benefit for the organization. FSM ensures that important information and knowledge are communicated between FileTrail and our client in both directions. Each project step is structured and augmented by tools that include documentation, worksheets, joint reviews, and other tools.

FSM addresses not only those tasks that are required from an implementation perspective, but also acknowledges the technical infrastructure, business processes and change management issues that must be addressed during the project. Clients are better prepared through FSM to take control of their FileTrail solution and make the most of it.

Affirm	Definition of the Project Goals, Resources and Relevant Facts
Evaluate	Definition of Environment, Inputs and Outputs

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Configure	Definition and up to 3 Rounds of Joint Review of Screens, Searches, Labels, Security, etc.
Install	Setup of Client Environment
Implement	Formal Training and Transition from Legacy Systems, Processes, and Policies

Statement of Work

Introduction

The purpose of this Statement of Work is to outline FileTrail's products and services which will be provided to Williamson County Courts. This Statement of Work will detail the work to be performed and any assumptions inherent in FileTrail's work. The Parties agree as follows:

Subject Material

Customer will license software from Supplier to manage physical case file folders. The software will manage different case files including but not limited to criminal, civil, juvenile and family cases. The software uses RFID GEN 2 and bar code to help track the case files. Using RFID the system will allow the customer to perform check in, check out, and track movement to new location functions.

Customer will purchase certain RFID and bar code scanning equipment from Supplier. Customer will also engage Supplier to perform task related to consulting for placement of RFID equipment, installation of the software program, configuration of the initial database, training and data conversion.

Pre-Implementation

The following sections define the responsibilities of all parties.

Initial visit – FileTrail, Inc.
 a) Meet with all parties who will be involved in all aspects of assisting FileTrail with installation.
 b) Discuss installation Requirements. . Discuss requirements for initial download of case data and users. Staff and roles in administration (security, users, configuration changes, etc).
 c) Tour Williamson facilities and current processes
 d) Discuss configuration and complete configuration form with non technical group.

Consulting for placement of RFID equipment
 a) Meet with department personnel to discuss objectives and current problems regarding movement of files.

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b) Recommend placement of antennas and Desktrackers based on those meetings
c) Test placement of certain RFID equipment with testing tools.
d) Review findings with project manager.

FileTrail will issue a report via email when these processes are completed and notify them of any issues with existing data.

Suggestions of necessary items to be included in order to ensure usability of on going import.

Suggested handling methodology of processes for handling of files from creation.

Recommended RFID locations.

Implementation

Installation and Data Conversion - FileTrail Inc and Williamson personnel.

a) Responsible for installation of FileTrail program on Customer's server: Williamson
b) Installation of FTSynchronize: Williamson
c) Configuration of FTSynchronize for legacy data: FileTrail Inc.
d) Loading of initial data as provided by Customer in a specified format: FileTrail Inc.
e) Determine best practices for configuration and importing of new data through FTSynchronize.

Installation and Data Conversion – Williamson County

a) Provide all associated servers, service packs, database software, 3rd-party software, associated tools, access rights, database rights and other materials required to install FileTrail software.
b) Provide appropriate passwords, credentials, and / or encryption keys necessary for full access for installation.
c) Provide access to technical personnel if assistance is needed while on-site performing installation.
d) Resolve any problems found with any material supplied in provision a), above.
e) If necessary, assist in acquiring appropriate use rights for materials.
f) Provide initial data for importing in one of these formats: delimited ASCII text, MS Excel XLS, or MS Access MDB.

Process and Deliverables Installation on site.

FileTrail will assist with installation of FileTrail as needed. FileTrail will load an initial load of data supplied by Williamson County into the FileTrail system. FileTrail will assist

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with an initial load of users as supplied by Williamson. FileTrail will assist with the installation and test FTSynchronize, with assistance as needed. FileTrail will test connections of RFID hardware and review system with Williamson staff. FileTrail will assist with installation of RFMobile on workstations designated by Williamson.

Database configuration and review – FileTrail - Via Telephone and Internet

a) Interface with customer to review configuration of the initial database.
b) Make changes to the FileTrail configuration as requested by customer.
c) Make recommendations for data capture of required fields.
d) Review configuration changes with customer.
e) Determine file room and archive locations and request methods.
f) Review label design and print method.
g) Add initial administrative user.
h) Conduct second and third reviews, if needed, with customer.
i) FileTrail will make additional configuration changes if needed when on-site for training.

Database configuration and review –Williamson County- Via Telephone and Internet

a) Customer will have appropriate people available for configuration reviews.
b) Customer will review configuration and make decisions related to the user-defined fields.
c) Customer can provide FileTrail with all necessary information related to location names, file rooms and initial administrative staff.
d) When complete customer will approve initial configuration.
e) Test printing labels from FileTrail website.

Configuration and Review

FileTrail will utilize information received at initial site visit to configure the first review. The configuration will be available on the Supplier's web site via password for the customer to review. Supplier will review the configuration with the customer three times. The Supplier will make configuration changes for the customer as required, during subsequent reviews, in an attempt to create the best configuration for managing customer's files with the goal of best practices.

Upon completion of configuration FileTrail will provide access to the Customer for further review prior to training:

The configuration will cover the following topics:

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Developing Fieldsets for Claims and Policy files.

Completing the configuration build, including data fields, types of fields, names of fields and required fields.

Listing of known filing areas including archive facilities.

Listing of media types and categories.

Requesting types

Results of successful configuration:

Customer signs off on configuration of the software.

Customer provides list of administrative users.

Customer installs configured database in application.

Post-Implementation

Training – FileTrail – Customer site

   a) Training will be done from the FileTrail website.
   b) Will prepare training agenda.
   c) Will help customer determine who should be trained in the appropriate user sessions.
   d) Provide quick reference guides for users.
   e) Install bar code scanners.

Training – Williamson County – Customer site

   a) Coordinate user attendance to training sessions, based on type of user.
   b) Provide and setup training room, LCD projector, and training workstations with internet access.
   c) Each person being trained should have a workstation for training.

Process and Deliverables – Training

The training will be performed at customer's facilities. The training time will be agreed upon by both parties. Customer is to receive three days of training. Supplier will provide an agenda for training and help customer determine which users should attend which classes. Customer will supply number of personnel for each class. Supplier will provide a general quick reference guide for users to reference after training.

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Customer agrees to have access to the internet for each user attending training. Customer consents that it is best to train from Supplier's internet site rather then client's server because of use of the production system during training.

Customer Service

Maintenance and Support – FileTrail – Via telephone and internet

a) Support is provided between 7:00 AM to 5:30 PM PT Monday through Friday, except for US holidays. Support can be obtained by calling the Support number or using the Support email address listed on the FileTrail website (http://www.filetrail.com).

b) Support includes end-user issues such as 'How do I...' questions. While many of these issues are explained in on-line help, manuals, or QuickRef guides, we still handle these questions.

c) Support includes administrative-user issues such as 'How do I...' questions. While many of these issues are also explained in on-line help or manuals, we still handle these questions.

d) Support includes resolution of technical issues and programming bugs not caused by client, nor 3rd-party software or hardware

e) Support does not include consultative questions that involve analysis of, or judgment on product configuration, implementation changes, configuration changes, import or conversion of additional data, or similar services.

f) Support does not include changes to features nor functionality of the licensed Program(s).

g) In some cases, support may require the customer to provide FileTrail, Inc. with copies of the FileTrail database. All such materials will be handled under strict non-disclosure.

h) FileTrail, Inc. does not support third party products, including by not limited to: MS Access, MS SQL Server, Oracle, MS IE, Netscape, printers, scanners, or other products not sold by FileTrail, Inc. Client is responsible for all installation and configuration of 3rd-party products, including security-related configurations such as users, privileges and permission settings outside of FileTrail.

Maintenance and Support – Williamson County – via telephone and internet

a) Customer will have one or two named contacts that have completed FileTrail Administrative and End-User training to act as a central point of contact for all customer support issues. Failure to named contacts qualified may result in delays to resolution of the issue, and are beyond

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FileTrail's control. Customer is responsible for keeping named contacts qualified.

b) Customer will have a named technical person who can provide assistance when needed to resolve a support question that involves the client's peripherals, workstations, database, or servers.

c) Supplier may require the customer to send a copy of their database to Supplier to resolve certain maintenance issues. Shipping time and failure to provide the database when requested will result in delays to resolution of the issue, and are beyond FileTrail's control.

d) Customer must identify whether the contact for Support is for a How Do I Question, Non-Critical Issue, or Critical Issue. All Critical Issues must be support by an email to the Support email address with an attached Word document containing a brief but clear and complete narrative and, if possible, all relevant screenshots illustrating "before and after" conditions. Work will not begin on Critical Issues until the supporting Word document is received. Failure to use the email or to properly document a Critical Issue will result in delays to resolution of the issue, and are beyond FileTrail's control. FileTrail will request more information when the supporting Word document fails to convey the situation, conditions or error message. In case of a Critical Issue, client must provide access to the staff encountering the error and any technical, help desk, or DBA staff as requested. Failure to make these staff available will result in delays to resolution of the issue, and are beyond FileTrail's control.

Resource Requirements

This is the listing of resource requirements to be used on the project.

Software – Supplied by FileTrail, unless otherwise specified below.

> 5 Concurrent Access Licenses of FileTrail Professional
>
> FTSynchronize
>
> RF-Desktop
>
> FT-Portable

Hardware – Supplied by FileTrail, Inc.

> 2 – RF-Taggers
>
>> Taggers are for the desks of those who will do assignment of RFID tags to new or existing files.
>
> 2 – RF-DeskTrackers

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DeskTrackers are for the desks of those who will do check-in and check-out or for self-serve check-out stations.

2 – RF-MobileTrackers

Portable Tracking allows a handheld RFID tracker to be used remotely to record movements, conduct audits, or find missing files.

12,000 – GEN 2 EPC compliant RFID tags

Hardware and Software

The following is the complete listing of required equipment supplied by Customer:

Server OS - Windows 2000 or 2003 Server

CPU for server and database.

Database – MS Sql Server 2000 or 2005

Software – IIS 5.0 or newer sessions enabled.

Microsoft Windows script 5.6 or newer.

Microsoft .Net Framework 1.1

Workstation – Internet Explorer 5.5 or newer.

Netscape 6.0 or newer.

Firefox 1.0 or newer

Cookies, Javascript and popups enabled

Personnel resources supplied by the Customer.

Anyone who will be required to assist with any parts of the installation (DBA, Network Admin, Desktop Support, person exporting data), plus any non-technical people who will have input into configuration.

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SCOPE OF SERVICES

Hardware Requirements

a. FileTrail provides Gen 2 Passive RFID tags, pre-programmed with a globally-unique value.

b. FileTrail's RF-Mobile platform provides QuickFind functionality to locate missing files, providing auditory and visual alerts.

Software/System Requirements

a. FileTrail will utilize a SQL Server 2000 or 2005 database, sized as needed.

b. FileTrail can be implemented on a single shared or dedicated server, or on separate database and web servers.

c. FileTrail provides an unlimited number of user-defined fields, in addition to core data elements like current location, creation date, etc. This allows different sets of fields to be utilized for different Division, adapting to the data collected by the Case Management System of each Division. Our new volume data type automatically increments to the next volume as new file volumes are being created. Along with Case Number, the volume field assures that all volume records for a multi-volume case file reflect updates from the integration with the case management system.

d. FileTrail's FTSynchronize will utilize a specific file to load data on new or updated case, or the calendar. This same mechanism will be utilized for the initial load of existing case data to initially populate the FileTrail database.

e. FileTrail licensing is broken into three parts. FileTrail Professional is a full-featured suite (5 CALs) used by people to assign RFID tags, pull for calendar, and manage court operations. QuickSearch tools helps staff locate all volumes for a specified case. FileTrail Professional has a separate, secured authentication process.

f. FileTrail can support users in any location, so long as users at those locations have access to the web server through the Court's firewall.

g. The FileTrail user interfaces are completely web-based. There are a few components that are required at the desktops which connect with peripheral hardware. No local installation is required at other workstations.

h. FileTrail configuration tools allow the addition of an unlimited number of user-defined fields, user-defined item screens, user-defined search criteria and search results, user-defined black & white labels, and more. All configuration tools are included with every system.

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i. FileTrail utilizes passive RFID technology.

j. FileTrail QuickSearch provides staff with a basic search for fast access to the location of all volumes for a specific case. FileTrail Professional contains configurable search screens to provides staff with fast access to the location of all volumes for a specific case.

k. FileTrail can work within and Court's network of AD servers, and utilize Windows Authentication (recommended) or LDAP/AD Authentication (usually overkill and more complicated to configure).

l. FileTrail's RFID Tagging feature allows for fast tagging by leveraging existing bar codes.

m. FileTrail retrieves and displays any or all Case File information based on a scanned bar code number or scanned RFID tag. Specifically, in the Tagging feature, the user will be alerted if the bar code they have scanned already has an RFID tag associated with it, helping to identify that there is a duplicated bar code value.

n. FileTrail automates boxing of files for storage, using either bar code or RFID.

o. FileTrail accommodates processing of a single item or batches of items in every transaction. These include tracking transactions (check-in, check-out, transfer, containerize, and more), status transactions (mark as missing, destroy, and more), and data management transactions (batch update).

p. FileTrail provides a clear, English-like statement of location for every possible location or status of an item through its life-cycle. Here are some examples, though the names of locations may be configured to your own:

   ° In **Criminal Files**

   ° Out to **George Smith** (map)

   ° Out to **Courtroom A7** (map)

   ° In **Criminal Files** Seen since at **George Smith** (map)

   ° On **Shelf A-03-7** In **Criminal Files**

   ° In **06-3225364** In **23-23523** In **Central File Room**

   ° In **06-3225364** Out to **Sue Gonzales** (map)

   ° In **23-23523** In **Central File Room**

   ° In **23-23523** In **Central File Room** (staged for Archiving)

   ° In **23-23523** At **Archival Storage**

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- ° Missing since 03/21/2006

- ° Merged into 🗔 **06-123423 Volume 1**

- ° Destroyed on 11/3/2006

q. FileTrail provides a chain of custody for each item which cannot be modified. The chain of custody reflects status events (Creation, Missing, Destroyed) and location events (Check-in, Transfer, Move, and more), logging the date/time and user responsible for each.

r. FileTrail tracks exhibits, assets, and evidence in the same interface. Any type of item can be tracked that can either be bar coded or practically read with RFID. Our enterprise-scalable security allows you to control who may see each type of item and what they can do with it.

s. FileTrail allows files to be flagged as Missing, maintaining a Missing list with convenient access to chain-of-custody for each. Missing Items can be downloaded to the portable scanner and searched for using RFID. The audible and visual alerts (similar to sample shown at right) provide information about where the file needs to be routed..

Found Missing Item

CRIM 86-001372
Smith, John, vol. 3

Pending Requests: 3

Next Requestor:
Hon Jim Smith at Dept 11
requested on 2/27/2007

t. FileTrail provides configuration of an unlimited number of locations representing staff desks, file rooms, courtrooms, chambers or other physical locations. File room locations can be subdivided into shelves. Our powerful shelf-generation tools create identifies and bar codes for thousands of shelves simply by entering the ranges of up to five user-defined dimensions (such as aisle, stack, shelf, slot). Each location can be uniquely represented by a bar code, RFID tag, or both.
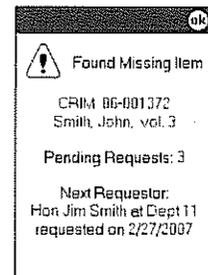
Reports

a. FileTrail can report or export information about the location of case files. Selection of which case files to include can be made on any data elements (case number, division, file date, etc.), and can be sorted by these data elements.

b. FileTrail can report or export information about the location of case files. Selection of which case files to include can be made by location (i.e. all case files at a courtroom), and can be sorted by these data elements.

c. FileTrail allows files to be requested for a specific date and time in the future. These requests will appear in the request fulfillment process a number of days in advance, as configured by the Court. This data can also be imported from the calendar of the Case Management system, streamlining pulling for Calendar with location-based Pull Lists sorted to structure a single-pass through the file room or Court facility to retrieve files.

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d. FileTrail provides for configurable per-user Time Limits that set the number of business days that a person should have a file. The Overdue Items screen can be printed as a report. In addition, an email notification can be generated for a specific person with a single click. The email is pre-populated with the person's email address and a list of files which are over the time limit.

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TECHNOLOGY OF PRODUCT

See Williamson County form for Requirements of Tracking System (See Attachments).

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COST PROPOSAL

The Pricing below reflects the costs for the requested items as follows:

- Amounts in the "Initial" column reflect the initial costs, including first-year maintenance.

- Amounts in the "Annual" column reflect the annual costs due at the beginning of the 2nd year of operation, and thereafter adjusted by CPI.

- This pricing is good for sixty days from the date of this document. Prices may change without notice, but are guaranteed up to expiration of this document. All prices are provided in US Dollars (USD).

- Client will reimburse FileTrail for all reasonable expenses (including airfare, car rental, hotel, meals, parking, etc.) incurred during on-site activities. Payments are due thirty days from date of invoice.

SOLUTION

	Initial	Annual
Core Components		
FileTrail Professional	$ 13,600	$ 2,950

This license Includes:

- FileTrail Professional 5 CALs
- Two direct-connect CCD bar code scanner
- Configuration process (up to 5 fieldsets)
- Training (3 days on-site)

FTSynchronize ($2,500 initial, $500 annual)	$ 2,500	$ 500
2 **RF-MobileTracker** ($5,995 each, $800 annual)	$ 11,990	$ 1,600

RF-Mobile portable tracking allows a handheld RFID tracker to be used remotely to record tracking movement, conduct audits, or find missing files.

2 **RF-DeskTracker** ($1,295 each, 120 annual)	$ 2,590	$ 240

DeskTrackers are for the desks of those who will do check-in and check-out or for self-serve check-out stations. Includes RF-Desktop software.

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	Initial	Annual
2 , RF-Tagger ($695 each, 70 annual)	$ 1,390	$ 140

Taggers are for the desks of those who will do
assignment of RFID tags to new or existing files.

Services

Configuration/Implementation of FTSynchronize	$ 1,600	
Initial Loading/Migration of Data (tbd)	$ 2,000	
RFID Implementation/Training	$ 1,600	

Supplies

1 , RF-TrackingTags ($.40/per tag)	$ 4,800	

MARKETING ACCOUNT

FileTrail provides a special discount for clients who elect to be a Marketing Account. By
electing to accept the Marketing Account discount, Client agrees to provide quotes and
authorizes FileTrail to write and publish an article related to Client's use of FileTrail
products and services. Client will have thirty days to reject materially-incorrect
statements or content which reveals competitive trade secrets or confidential
information.

	Initial	Annual
Marketing Account Discount:		
10% off FileTrail Professional	$ -1,360	$ -295
No Charge for Initial Loading/Migration of Data	$ -2,000	
No Charge for RFID Implementation/Training	$ -1,600	

HARDWARE MAINTENANCE

The optional Hardware Maintenance covers all hardware beyond the manufacturer's
warranty of 90 days. Under this optional plan hardware is covered for normal wear and
tear failure and is repaired or replaced at no cost, and a loaner is provided during repair
or replacement.

Hardware is not covered for abuse -- including, but not limited to, dropping, damage
from unintended uses, or intentional damage -- or natural disasters -- including, but not
limited to, flood, roof leakage, fire, lightning strike, or electrical surge.

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Replacement is limited to replacement of the same model or functional equivalent. In the case that no functionally-equivalent hardware is available, FileTrail will pay the portion of the cost of the replacement equal to the retail price of the old hardware, with client pay the remaining difference.

FileTrail will provide support in the removal or installation of covered hardware by telephone. Support can be performed by FileTrail on-site with the additional payment for travel time at our standard hourly rates and reimbursement of travel and accommodation expenses.

	Year 1	Year 2
Optional Hardware Maintenance:		
Percentage of Retail Hardware Price	3%	4%

PROJECT TOTALS

	Initial	Annual
Core Components	$ 32,070	$ 5,430
Services	$ 5,200	
Supplies	$ 4,800	
TOTAL	$ 42,070	$ 5,430
Marketing Account Discount	$ -4,960	$ -295
TOTAL w/ Discount	$ 37,110	$ 5,135

Per Unit Costs also outlined in Price and Specification Sheet (See Attachments)

LICENSE AGREEMENT

Limited Use License Agreement

This Limited Use License Agreement (the "Agreement") is effective as of the date of receipt of FileTrail software (the "Effective Date"), by and between FileTrail, Inc., with its principal office

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at 111 North Market Street, Suite 715 in San Jose, CA 95113 ("FileTrail") and Williamson County Clerk ("Client").

1. LICENSE

(a) In consideration of the payment of the initial license fee for products set forth in the Cost Proposal attached hereto, subject to the terms and conditions of this Agreement, FileTrail hereby grants to Client a non-transferable, non-exclusive, limited license to use Program(s) as set forth in Section 2 below in object code only solely for Client's internal business purposes. All right, title and interest in and to the intellectual property embodied in the Program(s) and related documentation remain the property of FileTrail, except as licensed to Client under this Agreement. The license granted allows the Program(s) to be used for the benefit of Client, and the Program(s) may be used by and disclosed to employees and contractors of Client. Client shall instruct any such employees and contractors regarding the terms of this Agreement and obtain their agreement to be bound by the terms hereof. Client shall remain fully responsible to FileTrail for compliance by such employees and contractors with the terms of this Agreement. For this purpose, "Client" includes Client and its Affiliates, and an "Affiliate" of Client is any entity that directly, or indirectly through one or more intermediaries, is controlled by Client. The term "control" means the ownership of more than fifty percent (50%) of the voting stock of an organization.

(b) Client, its employees and its contractors will not make copies of Program(s) for any reason, other than one (1) copy per Server from which the Program(s) can be accessed, one (1) copy for backup and archival purposes, one (1) copy for training purposes, and one (1) copy for testing purposes. Any such copies must retain all original copyright and proprietary rights notices. Client, its employees and its contractors will not distribute this Program(s) to any third party.

(c) Client, its employees and its contractors will not make modifications to the Program(s), excluding modifications made through normal use of the Program(s).

(d) Client, its employees and its contractors will not transfer the Program(s) nor related documentation to any third party, except in connection with disaster recovery.

2. NUMBER OF LICENSES

The Program(s) licensed by FileTrail to Client under Section 1 above are listed on the Cost Proposal. Client is licensed to utilize the Program(s) against one FileTrail Database, however, such Database can be accessed any number of copies of the Program(s), from any number of Servers or PCs, and by any number of users subject to licensing restrictions as put forth in this license and its Exhibits and Cost Proposal. Additional copies of the Database may be made solely for backup, training and testing purposes.

The Programs comprising RF-Enterprise – RF-Manager, RF-Service, RF-Sync, and any application-specific RF-Connectors – are licensed on a server basis ONLY. RF-Enterprise may be installed on one application server or web server, utilized against one FileTrailRFID Database. Additional copies of the Programs and/or Database may be made solely for backup, training and testing purposes.

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"Concurrent Access Licenses" means the number of User Sessions active in the Program(s) at one time. "Users" means the Client, its employees, its contractors or other persons who can access the Program(s). "Sessions" means distinct sessions as defined and managed by Microsoft IIS. "Seat Licenses" means specifically named persons registered as Users in the Program(s).

3. COPYRIGHT

The Program(s) are protected by United States and International copyright laws and International treaty provisions. Client agrees to treat the Program(s) like any other copyrighted material except as otherwise provided under this Agreement.

4. RESTRICTIONS

Client may not alter, merge, modify, translate or adapt the Program(s) in any way including without limitation reverse engineering, disassembling, decompiling or in any other way deriving any source code. Client may not transfer, assign, loan, rent, lease, sublicense, time-share or disclose any portion of the Program(s) or documentation to another person or entity. Any unauthorized attempt to transfer this Agreement or the license granted hereunder shall result in the automatic termination of this Agreement and the license granted hereunder; provided, however, that Client may assign this Agreement to any Affiliate upon written notice to but without the consent of FileTrail; and provided further, that for purposes of this Agreement, the following transactions relating to Client will not be deemed an assignment of this Agreement and will not give rise to any requirement of consent by any party to this Agreement, nor result in any right to terminate or alter this Agreement: any merger (including but not limited to a reincorporation merger); any consolidation; any reorganization; any stock exchange; any sale of stock; any sale of all or substantially all of the assets; or any similar or related transaction in which Client is the surviving entity or, if Client is not the surviving entity, the surviving entity continues to conduct the business conducted by Client prior to consummation of the transaction. This Agreement may be assigned by FileTrail to any third party. Any attempted assignment or delegation in contravention of the above provisions shall be void and ineffective. Client shall fully comply with all applicable governmental regulations and laws in effect during the term of this Agreement, including without limitation compliance with all export controls on the export of the Program(s) (including without limitation any intellectual property embodied therein).

5. LIMITATION OF LIABILITY

In no event shall FileTrail be liable to CLIENT for any incidental, consequential, special or indirect damages (including but not limited to, damages for loss of business profits, loss of good will, business interruption, loss of business information, or the like) arising out of the use or inability to use the Program(s) OR TERMINATION AS DESCRIBED IN SECTION 9, even if FileTrail knew or should have known of the possibility of such damages. In no event will FileTrail's liability arising from use or inability to use the Programs or arising under this Agreement exceed the amount paid by CLIENT to FileTrail under this Agreement.

6. LIMITED WARRANTY

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FileTrail warrants that, to its knowledge, the Program(s) do not infringe upon any copyright, trademark, trade secret, patent or any other proprietary right of any third party. FileTrail warrants that it has used all reasonable efforts to ensure the Program(s) are virus free at the time of shipment to Client. FileTrail warrants that for a period of ninety (90) days following the shipment of the Program(s) by FileTrail, the Program(s) will operate materially in compliance with the description set forth in the documentation accompanying the Program(s).

7. WARRANTY DISCLAIMER

NOTWITHSTANDING ANYTHING TO THE CONTRARY HEREIN, FileTrail does not warrant operating system software that is utilized by the Program(s). NOTWITHSTANDING ANYTHING TO THE CONTRARY HEREIN, FileTrail does NOT warrant that the Program(s) will operate error-free or uninterrupted. Except as provided by SECTION 6 OF THIS AGREEMENT, the Program(s) and accompanying documentation are provided "AS IS" without warranty of any kind, either expressed or implied, including without limitation the implied warranties of merchantability, fitness for a particular purpose and against infringement.

All Statements, technical information, recommendations concerning RFID products sold or samples provided by FileTrail are based upon tests believed to be reliable but do not constitute a guarantee or warranty. All products sold and samples provided with the understanding that Client has independently determined suitability of such products for their intended purposes.

8. ANNUAL LICENSE

The initial term of this Agreement commences on the effective date of this Agreement and shall expire at midnight (EST) on the first anniversary of such date. This Agreement shall automatically renew for additional consecutive one year periods, and the annual license fee is due and payable to FileTrail on that renewal date, until terminated in accordance with this Section 9. On payment, Client is provided with support and upgrades as described in Exhibit A. Software will discontinue operation 30 days after nonpayment. This annual license shall not be increased by more than the CPI in any one year, except for annual fees due for additional licensed programs or license quantities.

9. TERMINATION

This Agreement may be terminated by FileTrail upon 30 days prior written notice: (a) if Client is in breach of any of its material obligations, including but not limited to payment of fees or annual licensing, hereunder and the breach is not remedied within such 30 day period. Upon termination of this Agreement by FileTrail, for any reason, the Program(s) shall cease to function and Client will return to FileTrail, delete, or destroy all copies of the Program(s) and related documentation in its possession or control. Client may terminate this Agreement at anytime by notifying FileTrail in writing.

10. NOTICES

All notices or other communications required or permitted under this Agreement shall be in writing and shall be delivered by personal delivery, registered mail return receipt requested, a

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"Next Day" delivery service requiring signature, or by electronic means, addressed as indicated on the signature page of this Agreement.

11. GENERAL

Except as otherwise specified herein, this Agreement, or any portion hereof, may not be modified, amended or waived unless mutually agreed upon in writing by both parties. The failure of either party at any time to enforce any right or remedy available to it under this Agreement or otherwise with respect to any breach or failure by the other party shall not be construed to be a waiver of such right or remedy with respect to any other breach or failure by the other party. This Agreement may be executed in any number of counterparts, each of which shall be an original, but all of which together shall constitute one instrument. If any of the provisions of this Agreement shall be invalid or unenforceable, such invalidity or unenforceability shall not invalidate or render unenforceable the entire Agreement, but rather the entire Agreement shall be construed as if not containing the particular invalid or unenforceable provision or provisions, and the rights and obligations of each party shall be construed and enforced accordingly. The construction, interpretation and performance of this Agreement shall be governed by the laws of the State of California excluding its choice of laws rules and excluding the Convention for the International Sale of Goods. The headings of the several Sections are inserted for convenience only and are not intended to affect the meaning or interpretation of this Agreement. This Agreement shall constitute the full, complete and entire Agreement between the parties with respect to the subject matter of this Agreement. The provisions of this Agreement supersede all prior or contemporaneous, oral or written, quotations, communications, agreements, and understandings of the parties with respect to the subject matter of this Agreement.

12. CONDITIONS

Client is responsible to provide software and hardware according to FileTrail technical requirements, including, licensing of MS SQL Server, Oracle, or other 3rd-party software.

Client will designate technical staff member to install the FileTrail applications and be a project resource during other installation and implementation tasks.

FileTrail will test and configure all hardware purchased under this agreement.

Client will provide Ethernet connections and power sources for RF-ZonePorts.

Client will provide any desired alterations to facilities, cabling, power, etc.

13. TERMS

The project will be invoiced on approval as follows: 50% in advance, paid with delivery of a signed copy of this document. Another 25% will be invoiced on delivery of software and configured FileTrail database, with the final 25% invoiced on completion of training. Payments are due thirty days from date of invoice.

Clients canceling or postponing on-site activities on notice shorter than 14 calendar days prior to the start of travel will be responsible for 25% of the fees for the previously scheduled training,

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but no less than $2,000, plus any incidental expenses incurred as a direct result of cancellation or rescheduling.

Client will reimburse FileTrail for all reasonable expenses (including airfare, car rental, hotel, meals, parking, etc.) incurred during on-site activities. Payments are due thirty days from date of invoice.

Annual fees as quoted include licensing, telephone support, all upgrades, and all patches.

Additional products or services requested by the Client will be provided at standard rates.

14. ACCEPTANCE OF PROJECT

The undersigned acknowledge the terms put forth in this proposal and license. This acknowledgement does obligate Client to purchase the proposed solution, and certifies that Client has reviewed and understands the solution and its pricing. Elements of service, software, or hardware may be added or removed at the Client's discretion at any time during the implementation of the solution and will be invoiced at standard rates.

For FileTrail

Signature

_____

Printed Name

_____

Title and Date

_____ _____

For Client

Signature

_____

Printed Name

_____

Title and Date

_____ _____

15. MARKETING ACCOUNT

FileTrail provides a special discount for clients who elect to be a Marketing Account, detailed in the Cost Proposal. By electing to accept the Marketing Account discount, Client agrees to provide quotes and authorizes FileTrail to write and publish an article related to Client's use of FileTrail products and services. Client will have thirty days to reject materially-incorrect statements or content which reveals competitive trade secrets or confidential information.

Examples of the quality of materials produced about other Marketing Account clients are included as Collateral.

For Client

Initials _____

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Exhibit A - Annual Agreement

1. PROGRAMS

FileTrail, Inc. licenses and provides support and upgrades for the Programs listed in the Cost Proposal. Licensing, support and upgrades are included as a part of the annual fee.

2. SUPPORT

Support of these products is provided between 8:00 AM to 6:00 PM EST, Monday through Friday, except for US holidays. Support can be obtained by calling the Support number or using the Support email address listed on the FileTrail website (http://www.filetrail.com).

Support includes end-user issues such as 'How do I...' questions. While many of these issues are explained in on-line help, manuals, or QuickRef guides, we still handle these questions.

Support includes administrative-user issues such as 'How do I...' questions. While many of these issues are also explained in on-line help or manuals, we still handle these questions.

Support includes resolution of technical issues and programming bugs not caused by client.

Support does not include consultative questions that involve analysis of, or judgment on product configuration, implementation changes, configuration changes, import or conversion of additional data, or similar services.

Support does not include changes made to the features or the functionality of the licensed Program(s).

Support does not include resolution of internal technology infrastructure issues.

In some cases, support may require the customer to provide FileTrail, Inc. with copies of the FileTrail database. All such materials will be handled under strict non-disclosure.

FileTrail, Inc. may or may not elect to assist with third party products, including by not limited to: MS Access, MS SQL Server, Oracle, MS IE, Netscape, printers, scanners, or other products not sold by FileTrail, Inc.

FileTrail, Inc. requires that one or two named contacts act as a central point of contact for all customer support issues.

3. UPGRADES

Software Upgrades include the following:

- ❖ Software Upgrades via web site or email
- ❖ Software Patches via web site or email.

Software Upgrades do not include the following:

- ❖ Additional Named Software
- ❖ Additional Concurrent Access Licenses
- ❖ Additional Third Party Software

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FILETRAIL RFID™

THE TECHNOLOGY FOR TRACKING

Attachments

Requirement of Tracking System

Minimum Specifications	Does your proposal meet specification? Yes or No	Explain in detail how your proposed system meets the Specification
Ability to track active files, performing check-in and check-out functions from file areas	Yes	Check-in and check-out are automated with either bar code scanning or RFID reading for increased speed and accuracy. Check-in and check-out are batch-ready transactions, allowing multiple items to be checked out to a person after identifying them only once.
Ability to provide 12,000 tags per year, that are thin, easy to apply and extended durability	Yes	
Ability to store each movement in a location history that can be viewed, but cannot be edited or altered	Yes	Examples of "Current Location" Out to ⚆ Vincent Garcia 🏠 In ▭ 1067-11542 - 2000 Cases, 1 of 12 on Shelf: 3 A in Central Files
Provide a status monitor listing attention items like: overdue, pending requests, etc.	Yes	Shows: Requests for Items in the file room Requests for Items in circulation Items to pull from archive Files to be created for new cases Overdue Items Items needing to be refilled Tasks on Items in the file room Tasks on Items in circulation Portable scanning and audit reports And more…

Ability to use a portable scanner to record movements using RFID reading:
    Check in
    Check out
    Location Change
	Yes	Portable Scanning uses RFID reading to perform the following functions:
		• Check in
		• Check out
		• Transfer
		• Assign files to box
		• Assign files to shelf
		• Stage boxes for archiving
		• Receive from archive

Ability to flag files as missing and search for them with the portable reader	Yes	Audible and visual alerts provide information about where the file needs to be routed.

		Example:
		Found Missing Item ⚠ ok CRIM 06-001372 Smith, John, vol. 3 Pending Requests: 3 Next Requestor: Hon Jim Smith at Dept 11 requested on 2/27/2007
Ability of portable reader to support a scan from a distance of three (3) feet or further	**Yes**	See Price and Specification sheet.
Ability of proposed portable scanner to download information to data base	**Yes**	Our RF-Mobile software includes a Find-A-File function that helps locate misplaced Items. It also helps you perform Desk Audits and Item Inventories in a fraction of the time. Client workstation where RF-Mobile portable scanners will need Microsoft ActiveSync 3.7 or newer.
Ability to generate a report from scanner download	**Yes**	Audit and transaction reports may be printed from a scanner download.

Price and Specification Sheet

1.	Repair Policy	All hardware is covered by manufacturer's warranty of 90 days and will be replaced immediately. Thereafter, hardware can be covered under the Annual Hardware Maintenance program that includes repair/replacement at no cost, and a loaner during repair/replacement.
2.	Product Warranty	All hardware is covered by manufacturer's warranty of 90 days and will be replaced immediately upon report of a problem.
3.	Upgrade Management Policy	There are several ways in which updates occur – these differences are generally those mandated by the technology. • FileTrail – The FileTrail application is updated at the web server using a special script prepared by FileTrail to automate the process. Two zip files downloaded from your Client account on the FileTrail website provide all the required inputs for the upgrade scripts. The process can be expected to require about 10 to 15 minutes of a technical person's time. • RFDesktop – The application that communicates with desktop RFID devices can usually be upgraded by extracting a zip file that can be downloaded from your Client account on the FileTrail website. The process can be expected to require about 5 minutes of a technical person's time. • RFID Hardware – New releases of firmware for the RFID readers may become available. These require installation using a special firmware upgrade process while the device is connected to a PC by serial port. Firmware upgrades are not required, and generally are not anticipated. The process can be expected to require about 5 minutes of a technical person's time per device.
4.	RFID Tracking pad RFID DeskTracker *	Components: Reader/antenna, power supply, data cable. Dimensions: 8x9.5x1.1 Read Range: Can be adjusted from 2 inches to 48 inches. Storage Temperature: -20°C - +70°C Number of files that can be checked in or out at once: Unlimited Humidity: 5% to 95% NC Unit Cost: 1,295.00 in quantity of one Annual warranty $120.00 Read rate error percentage: Not Available
5.	Handheld Tracker	Operating Temp: -10°C - +50°C Storage Temp: -25°C - +70°C Humidity: 5% to 95% NC Memory Card: Flash 64MB Battery Type: Li-Ion 2000 mAh

	.	Battery Charger: Included Charge Life: Not available Time to Charge: Not available Read Range: 0 to 5 feet Unit Cost: $5,995, complete kit with RFMobile software. Annual support $800.00 includes replacement warranty. Read rate error percentage: Not available
6.	RFID Tag	Operating Frequency: 915 MHz EPC GEN 2 Antenna Size: .75 X 3.25 Tag Power Source: Passive Read Cycles: 400/second Write Cycles: n/a Anti-collision Type: n/a Memory Format: EPC Inlay Operating Temperatures: -40°C - +65°C Storage Operating Temperatures: -40°C - +65°C Shelf Life: Not Available Tag Construction: Inlay and adhesive paper cover. Unit Cost: $0.40

PROPOSAL SPECIFICATIONS

WILLIAMSON COUNTY PROPOSAL FORM

RADIO FREQUENCY IDENTIFICATION FILE TRACKING SYSTEM
FOR COUNTY CLERK

PROPOSAL NUMBER: 08WCP703

NAME OF PROPOSER: ___FileTrail, Inc.___

Mailing Address: ___111 North Market Street, Suite 715___

City: ___San Jose___   State: ___CA___   Zip: ___95113___

Email Address: ___JKing@filetrail.com___

Telephone: (408) ___289-1300 ext. 304___   Fax: (408) ___293 – 5357___

Mobile Phone: (408) ___482 - 7168___

CHECK ONE OF THE FOLLOWING:

☐ low item basis. (Will accept award on "any or all" items.)

☒ "all or none" basis. (Will accept award of "all" items only. If left blank, low item will apply.)

The undersigned, by his/her signature, represents that he/she is authorized to bind the proposer to fully comply with the terms and conditions of the attached Request for Proposal, Specifications, and Special Provisions for the amount(s) shown on the accompanying Proposal sheet(s). By signing below, you have read the entire document and agreed to the terms therein.
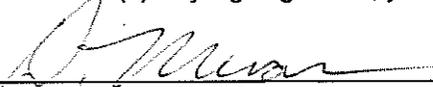
_____   Date of Proposal: ___November 13, 2007___
Signature of Person Authorized to Sign Proposal

Printed Name and Title of Signer:___Darrell Mervau, VP of Business Development and Sales___

DO NOT SIGN OR SUBMIT WITHOUT READING ENTIRE DOCUMENT

THIS FORM MUST BE COMPLETED, SIGNED, AND RETURNED WITH PROPOSAL

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Response to
RFP # 08WCP703
Radio Frequency Identification
File Tracking System

FILETRAIL RFID™
THE TECHNOLOGY FOR TRACKING

Collateral

RFID Solutions for Courts

FILETRAIL RFID
THE TECHNOLOGY FOR TRACKING

The Problem

Each day staff hours are wasted searching for case files. The real problem is that no one knows how much time is spent searching. Staff remember the extreme events; like the four-hour search they did last week. But, what passes without notice is the ten minutes here and fifteen minutes there that can add up to ten percent of each employee's day.

Many repetitive tasks related to handling case files are performed manually in many courts. The lack of automation for labeling, tracking, searching, requesting, pulling, and archiving case files creates inefficiencies, delays, and opportunities for human error.

The Solution

FileTrail™ saves time by eliminating searches for files. Our Passive Tracking™ technology uses RFID to capture the locations of case files automatically as they move among desks, offices, courtrooms and chambers. Locations are recorded without requiring any compliance by staff. Case files virtually tell the system where they are as they move.

FileTrail also automates manual tasks and streamlines file-handling processes. Integration with existing case management systems synchronizes data without manual entry and triggers creation of files for new cases. Folder volume and location information can be viewed from within existing case management systems.

The Results

- ▸▸ No more manual searches for case files
- ▸▸ Case file locations are updated as they move
- ▸▸ Staff search and locate case files from their desks
- ▸▸ No more broadcast emails searching for a lost file
- ▸▸ Multi-volume files are independently identified and tracked
- ▸▸ Pulling and delivery for calendar are simplified
- ▸▸ Creation and labeling of new files is automated

FileTrail Advantages

- ▸▸ Passive Tracking updates case file locations without the issue of staff compliance
- ▸▸ Inexpensive tags, longer read ranges, and non-proprietary Gen 2 RFID technology
- ▸▸ Automation of creation, labeling, pull for calendar, and other common processes
- ▸▸ Your folders available pre-color coded and/or pre-tagged with RFID
- ▸▸ Rapid transition services get you to full RFID implementation quickly

How did we know that you had the Olsen case?

The Files Told Us.™

Passive Tracking

Over the past twenty years, tracking systems have failed to gain acceptance in courts. This is because bar code tracking systems required all court staff to be active participants in order to keep case file locations updated at every move. It has always been clear that compliance would not be high.

With FileTrail, case files are tracked without staff participation. Our Passive Tracking RFID technology eliminates the issue of staff compliance while capturing every movement of the case files. The result is dramatic savings in staff time by eliminating searches for case files.

Locating Case Files Quickly

FileTrail can be integrated with your case management system to provide quick access to the location of case files. A click of a button shows staff folder volumes exist for a case, and where each volume may be found. Alternatively, staff can search directly in FileTrail using a case number or other criteria.

FileTrail provides pull lists to streamline pulling for the calendar. One pull list is produced for case files that are filed in the shelves, while another helps staff retrieve case files that are checked out. A third pull list contains case files that are already archived in storage, detailing which boxes contain the needed files.

Current Location of 06-0208173 volume 3

Criminal Division, Clerk's Office

Justifying the Investment

The FileTrail RFID solution is easy for courts to justify. The time spent searching for case files, disruption from broadcast emails, and labor used in other file-handling processes easily justifies the investment. Also, our approach allows us to configure a solution that will have the biggest impact and fastest ROI. Costs to uncover in justifying the project include:
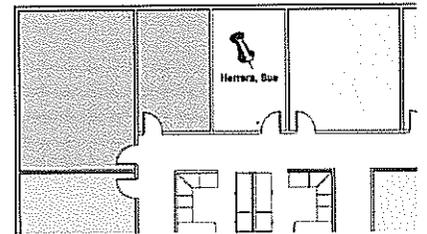
  ▶▶ Clerical and staff hours spent searching for files (8 to 12% is a rough estimate)
  ▶▶ Disruption caused by broadcast emails (a matter of seconds each, per person)
  ▶▶ Attorney and judges time spent looking for files (1 to 3% is a rough estimate)

When you register for our monthly iPod give-away at www.filetrail.com, you also gain access to our ROI Survey and ROI Calculator.

Contact us today about courts already using FileTrail RFID in your area.

Maryland Court Tries UHF RFID File-Tracking System

The 7th Judicial Circuit Court for Prince George's County plans to use EPC Gen 2 tags to track legal documents for 30,000 to 40,000 cases a year. By Claire Swedberg

THE 7TH JUDICIAL CIRCUIT COURT for Prince George's County, Md., is in the process of installing an RFID file-tracking system provided by FileTrail (www.rfid-file-tracking.com). The court plans to use the system to track files for 30,000 to 40,000 cases annually. Initially, the RFID system will be used in the criminal and juvenile divisions of the main courthouse.

With the new RFID system in place, the court will automate the tracking and management of case files (also known as case jackets) used to hold legal documents. This will spare employees from having to search manually for the files. FileTrail's vice president of product strategy, Tom Pemberton, says his company's system uses EPC Gen 2 UHF (902 and 928 MHZ) passive tags, unlike competing systems

utilizing HF (13.56 MHZ) tags. The UHF tags' greater read range, he says, makes it easier to track case jackets.

The FileTrail RFID tracking system includes devices called DeskTrackers and ZoneTrackers. DeskTrackers are small RFID interrogators that attach to desktop computers. The system is based on the EPC Gen 2 UHF standard, Pemberton says, which enables the DeskTrackers (which have a read range of 4 feet or more) to capture tag data automatically as files are placed on an employee's desk. ZoneTrackers, which act as RFID portals, are installed one on each side of a doorway. They capture data about the file as it enters a room, thereby making it possible to track files judges' chambers and other offices where they are not necessarily stacked near a DeskTracker.

The court is installing 58 DeskTrackers throughout the courthouse, as well as four handheld interrogators and ZoneTrackers for 70 portals to enable court staff to locate files as they move from one office to another, from an office to a court room, or into a judge's chambers. The court will pay between $200,000 and $250,000 for the entire system, including 100,000 tags at 32 cents apiece. The system should be fully deployed by Nov. 1.

Currently, each new case at the Circuit Court is assigned a file. Eventually, numerous files might be assigned to the same case. Each file receives a color-coded label, depending on the kind of case, and is printed with the name of the party involved in the case. Details about the file are hand-

keyed into the court's database, and new details are input by hand throughout the life of the case, such as the file's current user and the case's status.

"This is both labor-intensive and relies on staff to make entries into the system," says Joretta Meyer, the IT director at Prince George's County Circuit Court. "Searching for cases when needed is frustrating, as the data in the case-management system may be incomplete."

Court workers often find themselves searching for case files. "There are several reasons why a case jacket may be needed [by court staff]," Meyer explains. These include accommodating requests from a judge's chambers, other offices or the public, as well as processing incoming paper-work (pleadings, lines of appearance, court orders, and so forth). If someone needs a file not found on a shelf, that person must do a physical search, send e-mail messages or make phone calls in an attempt to locate it. The FileTrail system, Meyer says, will alleviate the need for manual track-ing of case jackets, while providing up-to-date location status.

With the FileTrail system, a court employee creates an RFID label printed with the case name on the appropriate color-coded label, then attaches it to the case jacket. Each time the folder's RFID tag gets within read range of one of those RFID interrogators, its tag's unique RFID number is transmitted via a Windows 2000 server to the SQL 2000 database, updating data about the file.

Several other government offices across the country are using RFID to track legal files, but those systems typically use 13.56 MHz tags, which have a much shorter read range than the system being deployed by the Circuit Court for Prince George's County. In Marin County, Calif., the district attorney's office is using a 13.56 MHz system from 3M's Security Systems division. With that system, users must hold the interrogators within about 3 inches of the files to read their RFID tags, according to Marin County District Attorney Ed Berberian Jr. (see *Marin County DA Saves With RFID*).

The FileTrail's longer read range, however, makes it easier for staff to adopt and use, Pemberton says. "In a lot of environments, management has trouble getting people to change and getting full compliance." In this case, employees don't have to think about the system because DeskTrackers and ZoneTrackers read each file's unique RFID number every time they move a file onto a desk or through a doorway with the readers installed.

The handheld interrogators are Windows-based mobile devices that can be used for tracking and audit purposes, allowing staff members to search for all case jackets to ensure they are not misfiled. The devices can scan all files in a room if an employee is seeking a specific file, saving time otherwise spent thumbing through a stack of files on someone's desk.

The court eventually plans to expand the RFID tracking system to other locations and divisions, though no specific dates have yet been announced. ■
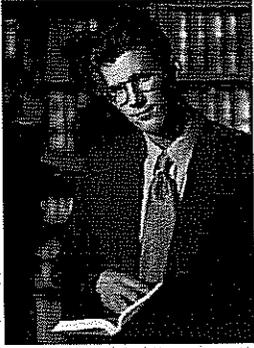
ABOUT FILETRAIL

A powerful Business Tool for Records Management and Tracking. FileTrail generates savings and rapid ROI by:

- Automating the management of physical filing, providing easy access to records information.

- Streamlining Business Processes for the records lifecycle, from creation through disposition.

- Adapts to your organization's Classification and Terminology, while guiding your staff to standardization and efficiency.

FILETRAIL

12 South First St.
Suite 107
San Jose, CA 95113
email: info@filetrail.com
phone: 800-310-0314

FileTrail

Lost Case Files FOUND

COMPUTERS HELP YOU FIND

almost anything these days—anything, that is, but a file that's missing from the courthouse file room. Staffers at every court have spent hours looking for that important document. When they can't find it, proceedings are delayed and judges are angry. Is there a better way?

There is. *FileTrail*™ software by FileTrail brings computer logic to the chaos that comes with thousands of paper files.

FileTrail helps clerks create files easily, manage them efficiently and learn where a file is at any time. It allows staff to order files without leaving their chambers. Most importantly, it means never losing documents again.

"Like it or not, courts can't do without thousands of paper files," said FileTrail Founder and Vice President Darrell Mervau. "But that doesn't mean they can't use today's

technology to manage them better. With *FileTrail*, it's easy."

FileTrail's senior staff bring more than 25 years of records and information management experience to bear on *FileTrail*, an industry-leading software system for records management.

Consider the U.S. District Court in Massachusetts, which turned to

> "We don't have anymore lost cases, because we know exactly where they are."
>
> —PC Administrator William Doe

FileTrail after judges complained about too many lost files. The court installed *FileTrail* to keep track of more than 33,000 civil and criminal cases dating to 1994. Almost immediately, old files were found and the complaints ceased.

"We don't have anymore lost cases," said PC Administrator William Doe, "because we know

FileTrail Technical Specifications

FileTrail will operate on any workstation that is running a current Web Browser. This includes workstations running Windows 95, 98, 2000, Me, XP, or Mac OS X, and others.

SERVER

Server OS: Windows 2000 Server

Database: MS SQL Server 2000
             or MS Access 2000

Software: MS SQL Server 2000
             IIS 5.0 or newer

CLIENT WORKSTATION

FileTrail will operate on any workstation that is running a current Web Browser. This includes workstations running Windows operating systems (95, 98, 2000, Me, XP), or Mac, Unix or Linux.

Web   Microsoft® Internet
Browser: Explorer 5.5 (for
             Windows) or newer
             (or Netscape®
             Communicator 6.0 or
             newer) with Cookies &
             JavaScript enabled.

CODE   HTML, VBScript,
BASE: Javascript 1.2, VB.Net,
             ASP.NET

MAJOR FUNCTIONALITY

- Records Classification, Indexing and Labeling
- Searching and Requesting
- Tracking with Bar Code and RFID Technologies
- Streamlined Archiving
- Accension (New Item Request)
- Retention Management
- File Room, Copy Center, Mail Room Management
- Records Center Management
- Commercial Records Center Interface
- Image Management
- Import / Export
- Reporting
- Security

exactly where they are."

Read on to learn how *FileTrail* can bring order to your court.
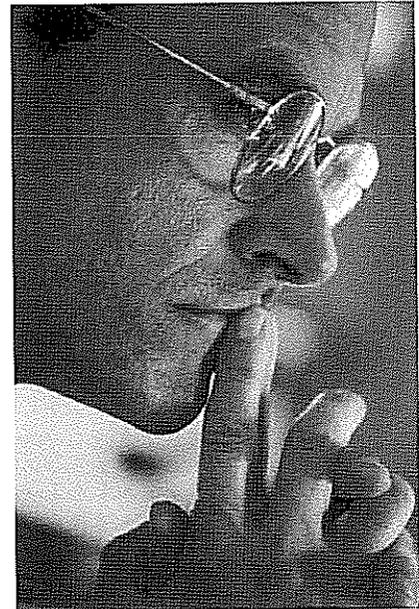
FILE ROOM OPERATION

FileTrail is a flexible and powerful database that makes it easier to manage the file room by accounting for each and every file. File room staff will find ample time savings as they make new shortcuts through old tasks and encounter options they've never had before.

With *FileTrail*, file room staff:

Know where files are. Type in a file's docket number and learn immediately what chamber it's in and how long it's been there. Or run an employee's name and learn which case files he has checked out. With *FileTrail*, clerks resolve the whereabouts of a case in no time at all.

Label files in less time with better results. Labeling a file should be a simple matter, but it often isn't. Clerks usually assemble labels by hand from lots of tiny stickers—stickers that have to be custom-ordered and that eventually fall off with use and age. The result is a file that's difficult to maintain and hard to find.

FileTrail solves these problems with a single label that prints to a regular office printer. The label is cus-

tomized and color-coded to blend with the current filing system. Its crisp and orderly appearance makes a file easy to spot. And the label, since it's of one piece and made of quality material, lasts years longer than those little stickers.

Make file management fast and error-free. *FileTrail* assigns a unique barcode to each file and every employee. In this manner, a file can be checked out of the file room by simply waving an optical scanner over the file's label and then over an employee's code on a chart. When used to check files in and out, *FileTrail* saves clerks minutes each day; when used to inventory the file room, it can save days.

Gain insight into your files. Who checks out the most files? What types

of files are most active? Detect patterns in the movement of files by running reports that can match any variables against each other.

Integrate and synchronize data easily. New case data moves automatically between the case-assignment program, *FileTrail* and CHASER, eliminating data entry. New cases, and even case updates from another mainframe, appear in *FileTrail* within minutes. This integration even blocks confidential data from the *FileTrail* case record when a case has been sealed.

The benefits keep adding up, said Ginny Hurley, operations manager for the U.S. District Court in Massachusetts.

> ## "Rather than come down to the file room on a futile search, they can know right away if the file is there or not."
> —Operations Manager Ginny Hurley

"In the long run it's going to pay for itself where we will have better control of who has the file and how long they've had it," Hurley said. "We find the more we use it, the more we're going to need it."

COURTROOM OPERATION

Intranet access extends the power of FileTrail to the desktop of every judge, secretary and clerk in the courthouse, saving time for everyone.

By means of an intuitive and easy-to-learn program, employees order files from the file room. If the file isn't currently available, they can learn who has it and request the file be sent along when it's free.

Users will find FileTrail seamlessly integrated with CHASER, from its similar color scheme to its use of a single login to both systems. FileTrail even has the power to integrate with EDMS and other imaging systems.

At the U.S. District Court in Massachusetts, FTConnect has saved clerks and secretaries both time and unnecessary trips. "Rather than come down to the file room on a futile search," said Operations Manager Ginny Hurley, "they can know right away if the file is there or not."

FileTrail frees clerks, secretaries and judges to focus on the workplace that really matters—their chambers—and helps the entire courthouse work more efficiently.

USER FEATURES
- File and Box Creation
- Attach Files to Boxes
- Records Classification
- Import Existing Data
- Ad Hoc and Standard Reports
- Retention Tracking
- Identification with Bar Code or RFID
- Bar Code Label Printing
- Color Coded Label Printing
- Automated Label Printing
- Unlimited Location History
- Item Edit Audit Trails
- Pull List
- Delivery List
- Time Limits
- Overdue Item Management and Emails
- Direct-Connect Bar Code Wands
- Box and Folder Tracking
- Archiving Automation
- Image Management
- Portable Tracking with Bar Code or RFID
- Item Requesting by Departmental Staff
- Item Calendaring by Departmental Staff
- Task Requesting (copying, faxing, shipping)
- Calendar/Request Fulfillment Management
- Secretarial and Admin Assistant tools
- Powerful Searching
- Shelf Labeling
- Self-Checkout Station for Open File Rooms

INTEGRATION
- Integrates with Existing Color Coding Software
- Synchronizes with Other Systems
- Integration with Commercial Records Centers
- Unattended, Scheduled Synchronization

CONFIGURATION TOOLS
- User-Configurable Search Tools
- User-Configurable Field Name, Data Types, Lookup Lists
- User-Defined Help
- Unlimited Definition and Tracking of Media
- Unlimited Levels of Organization, File Rooms, Archives, etc.
- Creation Requesting by Departmental Staff
- Powerful 10-Vector Security

"FileTrail was a leap forward for the firm in terms of automated file tracking and RFID technology."

Jody Rosenberg, Director of Operations
Sughrue Mion, PLLC

Background

Sughrue Mion, PLLC is a leading IP law firm based in Washington, DC. In 2001, Sughrue had implemented a Windows-based system to automate file room operations and track 12,000 active files. Over the years, the firm's database had grown to 140,000 files, the number of employees was approaching 250, and the volume of activity was much larger.

Sughrue recognized a growing need for all staff to have on-line access to the file inventory, as well as a need for more robust automation of repetitive file handling tasks. The firm selected FileTrail in May of 2005 because of its process automation, intuitive browser-based interface, and experience with RFID.

Requesting Saves Time

Attorneys and secretaries save time with FileTrail's easy-to-use interface at their desks. Tools for searching and requesting eliminate the time that would be spent otherwise calling, emailing, or walking to the file room.

The process is very easy. The search screen guides staff in searching for the files they need. Staff select the service they need - these are configurable and may include services for delivery, will call, photocopy, faxing, etc. - and complete the request. The new requests appear to staff in the file room, where pull lists, delivery lists and other tools ensure fast delivery.

"The ease of requesting files has had the biggest impact in terms of saving time for our firm," said Jody Rosenberg, Director of Operations. "The staff would not use our old system for requesting, but FileTrail is remarkably clear and easy to use."

Support Tools Save Time

Legal Secretaries generally face the task of doing all file management for a group of attorneys. Files may be checked out to the attorney or the secretary. And, secretaries must transfer files between their attorneys and other staff, as well as receive transfers from other attorneys and staff. The Admin Support tools in FileTrail make these tasks fast and easy for secretaries.

"The secretaries love the Admin Support tools in FileTrail," said Rosenberg. "For the first time, they can see what is checked out to their attorneys, manage those files, request files in their name, and do file transfers for them."

Reducing Costs With RFID

RFID technology adds a new level of intelligence to the filing system. Like bar codes, RFID tags provide a unique identifier for each file. However, RFID allows tasks like batch check-in and check-out to be performed many times faster than with bar code scanning.

"The intelligent file system has dramatically reduced the hours of costly and inefficient time formerly devoted to file management," said Tommy Sanders of Océ Business Systems, senior site manager at Sughrue.[1]

Sughrue conducts an audit each week of the 5,000 to 6,000 files that are checked out. This confirms and updates the location of files. RFID technology allows the audits which used to take 32 hours to be completed in four or five hours.

"FileTrail's experience in RFID really shows in the product design," said Chris Kempf, of the Information Technology department. "With our old system we had to buy different types of RFID tags to represent folders and staff - FileTrail does not have this requirement."

Client Overview

The firm of Sughrue Mion, PLLC has protected new technology for its clients for over forty years and is one of the leading boutique IP firms. In 2005, the firm was ranked 4th among trademark firms, and 2nd in number of utility patents issued by *Intellectual Property Today Magazine*. The file room, managed and operated by Océ Business Services, handles in excess of 1,200 files per day. Sughrue implemented FileTrail to improve file room operations and provide firm-wide access to locate and request files on-line.

Implementation Highlights

- FileTrail is integrated with the docketing system to automatically load new data and trigger printing of color coded labels
- FileTrail RFID File Tracking technology automates check-in, check-out, and weekly firm-wide audits
- Migration of all data from a Windows-based Opus32 system without disrupting the production environment
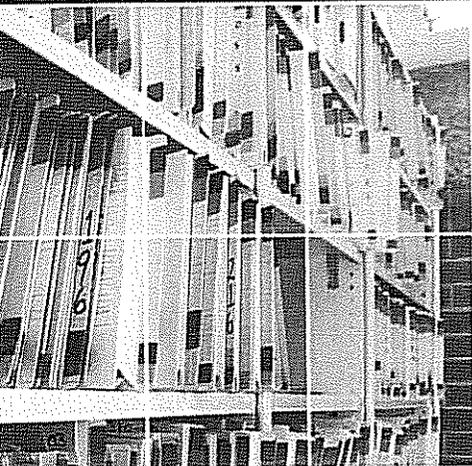
Key Benefits

- **Firm Wide Access** - Everyone saves time by searching, locating, and requesting files from their desks, while administrative support tools help Secretaries support their attorneys
- **File Room Automation** - FileTrail streamlines file room operations with integrated workflow processes and RFID technology
- **Easy Auditing** - Weekly audits can be done in one-fifth of the time using RFID technology
- **Seamless Integration** - Real-time integration with the docket system keeps FileTrail up-to-date and triggers printing of labels for new matters
- **Automated Labeling** - Color coded strip labels are printed from FileTrail, saving time over manual labeling methods

FILETRAIL™

...because Paper Happens©

http://www.FileTrail.com

About RFID

FileTrail uses both bar coding and RFID technologies to automate file tracking.

Similar to a bar code, an RFID tag in each file uniquely identifies the file. However, processes like check-in, check-out, and desk audits are much faster using RFID than using bar code scanning. This is because there is no line of sight requirement with RFID - the tags are recognized when they come close to the reader.

Also, many RFID tags can be read at once - a stack of ten tagged folders can be set on the RFID pad and all ten tags will be read.

FileTrail's new Gen 2 RFID and EPCglobal RFID tags provide cutting-edge benefits. The tags can be read from up to ten feet away and are one-third of the cost of tags from previous RFID technologies.

About FileTrail

FileTrail, Inc., is the leading provider of Web-based records management solutions. Firms of all sizes turn to FileTrail to streamline processes with the latest technology and most configurable software. Headquartered in San Jose, California, FileTrail has been providing solutions to law firms since 2001.

Lowering Cost Of Administration

Web technology allows FileTrail to be rolled out to attorneys and secretaries without effort. Everyone in the firm can access FileTrail at their desk.

"Our old tracking system was Windows-based and required installation at every PC," said Kempf. "With FileTrail, the software and upgrades are installed on the server."

Access to Information Benefits Staff

Access to file information through FileTrail has helped in many ways. First, the ability to login at every desktop empowers staff to make quick decisions and get things done faster. Knowing what exists and where it actually is helps them get the files they need faster. Rather than making broad requests to the file room for materials they need, requests are for explicitly-identified items they have found in FileTrail. Also, because the current location is shown, staff often have a more efficient option than making a request to the file room. When a file is already checked out to a person they can get the file much more directly and quickly by contacting that person.

"Our staff love that FileTrail gives them a one-click email to the person who has the file they need," said Rosenberg. "When you see that a file that you need is checked out, you can click on the email icon beside their name and FileTrail formulates an email for you instantly without typing."

FTMobile provides portable audit and find-a-file functionality using RFID.

Current Location Out to Vincent Garcia

One-Click Emails make it easy to get the file you need even though it is already checked out."

Integration Eliminates Data Entry

A critical success factor for the project was to avoid performing data entry in FileTrail. FileTrail staff worked with technical staff from Sughrue to provide real-time integration with the firm's docketing system.

"A new folder and color coded label are automatically generated in FileTrail as soon as a new Matter is opened in our docketing system," said Rosenberg.

Conclusion

The key benefits of FileTrail are clear. Easy-to-use browser-based software provides time-saving tools to attorneys and staff, while RFID technology speeds processing and automates tracking of files. Additional FileTrail features for administrative support and archiving also save time and increase control over files.

Contact FileTrail Today!

For more information about the benefits of automating with FileTrail, call your local FileTrail representative at:

FILETRAIL™

...because Paper Happens®

http://www.FileTrail.com

[1] Quote reprinted from a datasheet published by Checkpoint Systems, Inc.