



INFOLINX PRODUCT FEATURES

LAW FIRMS & LEGAL

Access and manage your most important records and information with records management software that's built to streamline, integrate, and automate. With a powerful core feature set and optional advanced feature add-ons, Infolinx delivers a comprehensive, scalable solution, aligned with your industry and business objectives.

CORE FEATURE SET



Track Files & Boxes



Client/Matter Management



Retention Schedule & Legal Holds Management



Integrated Barcode & RFID Technology



Flexible, Role-Based Security

Physical Records Management

- Track files and boxes with unlimited user-defined fields
- Simple check-in/check-out & transfer of records
- Create color and barcode labels
- Online pickup and delivery requesting with optional request approval workflow

Client/Matter Management

- Easily view linked files, boxes, and documents related to each client/matter
- Generate standardized document types to organize records related to each matter
- Add unlimited number of clients and matters

Barcode & RFID Integration

- Fully integrated barcode and Gen II RFID functionality for fast, efficient tracking
- Supports tethered, wireless, and/or portable devices
- Check items in or out instantly at workstations, file rooms, or records centers bypassing manual data entry

Comprehensive Audit Trail

- Detailed, permanent history of all data activity, including user ID and date & time stamp
- Searchable history with export option
- Capture all system configuration changes, user sessions, login history, and reason for changes

Retention Schedule & Legal Holds Management

- Create and apply records retention schedules
- Calculate retention based on time period
- Place records on legal hold
- Produce destruction reports

Full-Text, Keyword Searching

- Search using all data fields in the application
- Supports keyword, full-text, range, wild card, Boolean logic, comparison operators, and partial strings
- Saved search capability included
- Easily view, sort, and export search results

Workflow Notifications

- Create custom email notifications for specific users
- Configure notifications based on user actions, data changes, or events
- Easily add new notifications from user-defined fields

Extensive Reporting

- Includes 20 standard reports
- Create unlimited user-defined reports
- Export reports into Excel, PDF, or .csv formats

Flexible Security

- Configure an unlimited number of role-based security groups via LDAP or SAMLv2-compatible SSO system
- Restrict views at the table, row, or field level, as well as any function in the application

Infolinx WEB™ is a powerful, configurable records management platform built to address the complex business challenges and regulatory environment faced by organizations today.

ADVANCED FEATURES



Digital Content Management

Advanced Retention Schedules & Legal Holds Management

- Create an unlimited number of retention schedule records series and legal holds
- Configure retention schedules based on unlimited number of meta-data fields
- Supports time, event, and event + time-based series
- Includes advanced legal holds and citation or authority support

Digital Content Management

- Create and apply records retention schedules to associated physical records & digital content/electronic documents
- Attach electronic documents to physical records
- Full-text search of digital content
- Version control & easy data export
- Create and associate emails and attachments automatically



Advanced Retention & Legal Holds Management

Advanced Physical Records Disposition Support

- Auto-calculation of retention dates
- Easily filter and find available records series based on user
- Create and view multiple disposition reports including disposition approval, disposition pick list, and certificate of destruction

Enterprise Content Management Integration

- Associate electronic records stored in Microsoft SharePoint™, Laserfiche® and NetDocuments® with physical records stored in Infolinx
- Federated searching across applications
- Manage retention schedules from the Infolinx application

All trademarks and company names are the property of their respective owners.



Enterprise Content Management Integration

Off-Site Storage Provider Integration

- Seamlessly request and approve pickup or delivery of off-site records via integrations with storage providers
- Available integrations include Iron Mountain Connect™, O'Neil oneilBridge™, and Andrews Software InfoKeeper™

Ethical Walls

- Restrict attorney access to sensitive data
- Enhance risk management and information compliance



Off-Site Storage Provider Integration

Space Management & Cost Center Charge-back

- Identifies available space in storage facilities and suggest allocations for incoming boxes
- Configure for unlimited number of storage units
- Integrate optional storage and activity-based charge-back capability

Advanced Integrated Data Sharing

- Synchronize client/matter management from other systems
- Import files & boxes and request data

Supply Item Requesting

- Request delivery of new boxes, file folders, or barcode labels
- Allows records managers to track history of supplies over time