



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 the needs and objectives of law firms and legal departments.

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, Role-Based 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 is a powerful, configurable records and information management platform built to address the complex information governance challenges and regulatory environment faced by today's law firms and legal departments

ADVANCED FEATURES



Digital Records Management

Advanced Retention Schedule & 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



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

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™



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

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Digital & Physical Records Management

- Apply records retention schedules to physical records & digital content
- Auto-fill fields from barcodes or common document fields via OCR capability
- Locate files faster with full-text, content searching functionality
- Ensure quality control with redaction and check-in/check-out functionality
- Create and associate emails and attachments via Outlook Plug-in

Enterprise Content & Document Management Integrations

- Associate electronic documents stored in NetDocuments®, Microsoft SharePoint™, Laserfiche® with physical records
- Federated searching across applications
- Use existing retention schedules from ECM/DMS to also govern physical records in Infolinx

Ethical Walls

- Restrict access to information, triggered by new clients, mergers, or departures
- Mitigate risk and meet compliance requirements for sensitive information

Advanced Integrated Data Sharing

- Sync and index data from multiple repositories and shared drives
- 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