



# MASTERTRAK™

ITEM INTELLIGENCE FOR RECORDS AND ASSETS

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MASTERTRAK BRINGS TOGETHER AND SIMPLIFIES THE IDENTIFYING, TRACKING, AND MANAGING OF PHYSICAL FILE FOLDERS, BUSINESS ASSETS AND RELATED ELECTRONIC FILES.



IDENTIFY

- Robust print engine for on-demand label printing
- Pre-printed factory labels
- Full-color printing and color matching
- User-zone-location labeling
- Print durable polyester labels using a laser printer
- Simple, easy encoding of RFID labels
- Custom label designs available

TRACK

- Barcode and RFID for tracking
- Simple path to add RFID functionality to existing barcode system
- Location-specific tracking
- Automation via desktop kiosks or networked readers for unattended tracking
- Detailed movement of items via audit functions

MANAGE

- Manage file movements
- Conduct faster audits and inventories
- Report, import and export assets
- Pick and return item lists for increased productivity
- Standardized reports and easy report filtering
- Chain of custody

THE EASY-TO-USE INTERFACE, CLIENT-SPECIFIC CONFIGURATION, AND AUTOMATION FEATURES ENHANCE DAILY WORK PROCESSES, IMPROVE COMPLIANCE, REDUCE RISK, SAVE TIME AND LOWER COSTS.

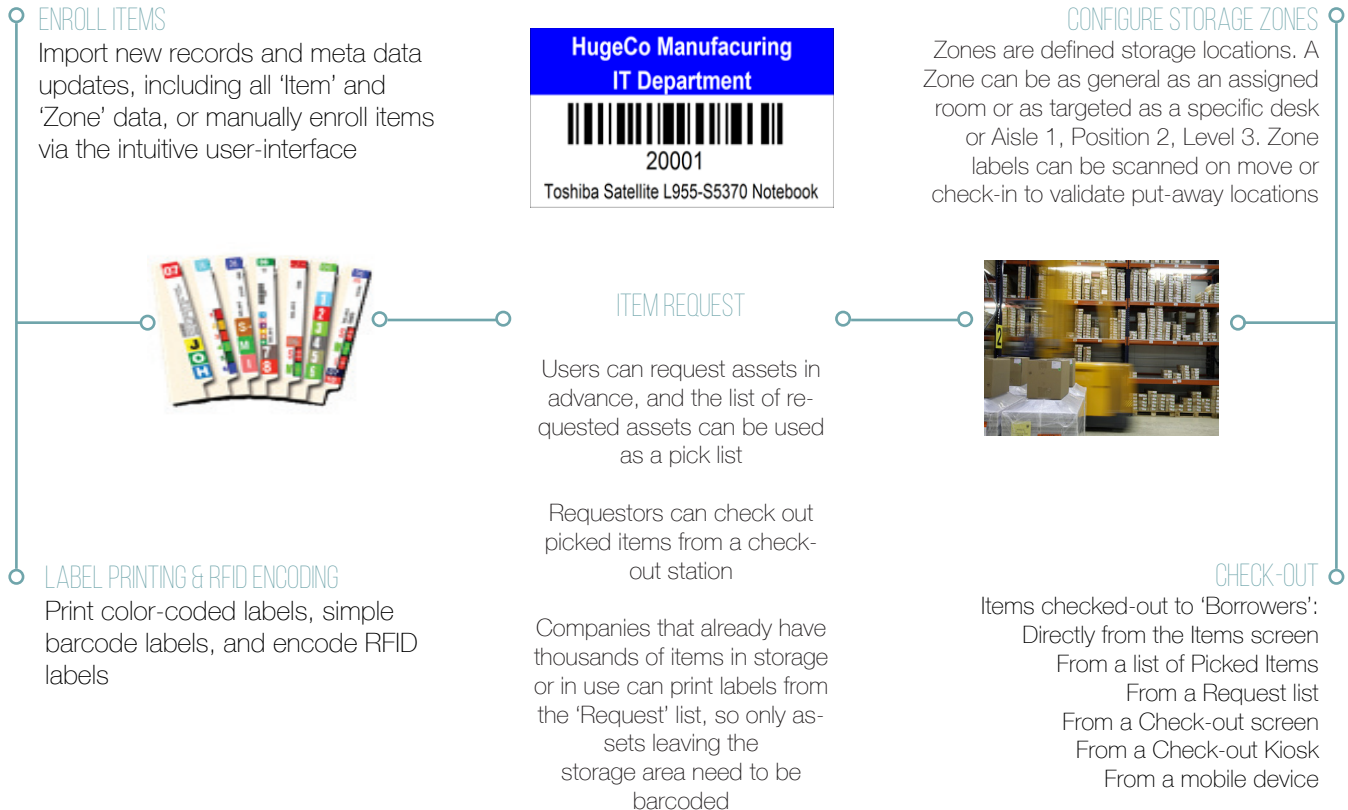
# TAILORED TO MATCH YOUR WORKFLOW AND FILING PROCESSES

MasterTrak's barcode and RFID tracking software allows for total item management systems on both an enterprise and a local level. Tracking is not just limited to inside the office environment. Evidence rooms, media vaults, financial institutions, legal entities, and government agencies can quickly implement a system to track anything and everything. Barcoding is perfect for line-of-site scanning, RFID for security and inventory in a fraction of the time barcoding takes.

- ✓ Fast and Easy Enrollment
- ✓ Item Check-Out Requests  
Pick Lists
- ✓ Item Check-In  
Check-In to Storage Location  
Return Lists



## WORKFLOWS FOR DOCUMENT LIBRARY AND ASSET TRACKING



# MASTERTRAK MODULE OPTIONS

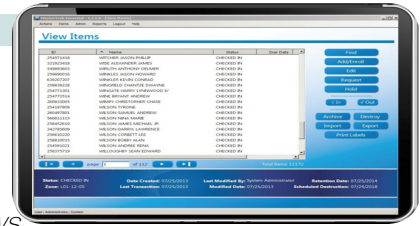
## ADD-ONS TO INCREASE TARGETED CAPABILITIES

### HIGH-DENSITY STORAGE ALLOCATION MODULE - EXCLUSIVE TO EDP

*Tracking software compatible with vertical carousels and high-density mobile storage*

*GPS-style tracking shows best route through carousel or shelving rows*

- Manage storage allocation across multiple high-density units
- Includes all check-in, check-out, and archiving functionalities
- Runs on Windows 7 and 8 PCs and tablets
- Barcode and RFID systems available
- Mount a tablet to your carousel to easily manage item movements and transactions
- Designate storage areas for specific departments or clients
- Load empty carousels in the correct sequence for proper load balancing



### LINKED ASSETS MODULE

*Attach electronic files for complete visibility to all records*

Associate an electronic file to a physical asset and store a copy of the electronic file in the MasterTrak database for fast and easy viewing and retrieval.

POPULAR FILE FORMATS INCLUDE:

-  MICROSOFT WORD
-  MICROSOFT POWERPOINT
-  MICROSOFT EXCEL
-  PDF DOCUMENTS
-  JPG/JPEG IMAGES
-  GIF FILES

### BARCODE AND RFID HYBRID SYSTEM

Several of our customers with controlled records rooms utilize a hybrid of both data collection technologies. For conventional check-outs of files to be reviewed in the records room, barcodes are utilized. For the files that leave the records room, an RFID tag is applied and encoded. This enables the records control team to search for the RFID labeled files throughout the facility or track their movements in real-time with fixed RFID portals.



Wall-mounted RFID Portal

INDUSTRY	HEALTHCARE Medical Clinics Hospitals Research and Testing	INSURANCE AND FINANCE Banks Loan Institutions	GOVERNMENT Forensics Law Enforcement Public Safety	LEGAL Law Firms Courts	GENERAL BUSINESS Human Resources
HIGH-DENSITY STORAGE	✓	✓	✓	✓	✓
VERTICAL CAROUSEL STORAGE	✓	✓	✓	✓	✓
LINKED ELECTRONIC ASSETS	✓	✓	✓	✓	✓
REAL-TIME TRACKING	✓		✓	✓	
COMPLIANCE AND AUDIT	✓	✓	✓	✓	✓
CHAIN OF CUSTODY	✓	✓	✓	✓	
ARCHIVAL/OFF-SITE	✓	✓			✓

## RFID SEARCH AND FIND MODULE

### RFID Can Read Multiple Tags Simultaneously

The manual inventory process requires personnel to individually match tag IDs or serial numbers, which is often time-consuming and inaccurate. Barcoding increases both speed and accuracy but still requires individual scanning. Our RFID readers can read up to 25 tags per second.

### RFID Does Not Require Line-of-Sight

Both manual and barcode processes require that the tags are physically located and viewable. RFID scanners can read tags that are not visible.

### RFID Improves Processes

Physically inventorying and auditing assets can be time and resource prohibitive, pulling valuable employees from their normal job responsibilities. Implementing an RFID solution can dramatically reduce the time and staff required to keep track of assets and provide better visibility while completing inventories in significantly shorter time frames.



## RFID KIOSK AND PORTAL MODULES

Convert your file folders or other items to RFID and automate your asset management

- Easy installation, cost effective
- Easy conversion of a barcode system to RFID
- Fully unattended self check-out
- Real-time check with RFID-enabled drop station

Our system consists of a computer-powered kiosk that has a touch screen, barcode reader and RFID reader. Records are checked in and out just like they were scanned with a barcode scanner, only faster and by the users, not Records Management personnel.



Door Portal Reader



Desktop USB Reader

# MASTERTRAK CASE STUDIES

## NATIONAL GUARD STREAMLINES STORAGE

The National Guard consists of Army, Navy and Air Force units. Within this large network of sites, the National Guard stores and manages medical file folders for reservists. At Dobbins Air Reserve Base, we deployed a well-designed storage system using our MasterTrak Essential HDSA solution:

- Color-coded folder labels using the tertiary terminal digit system
- Enroll new folders to proper storage zone

Zones Codes are assigned by tertiary terminal digit SSN.

- Pick folders from Request List

As folders are requested, the requests are sorted by storage zone for fast and easy picking of requested folders.

- Put away folders from Return List

As the folders are returned, the folders are sorted by storage zone for fast shelving.

- Audits

All folders in a zone can be quickly and accurately audited via barcode scanning.

- Imaged Documents

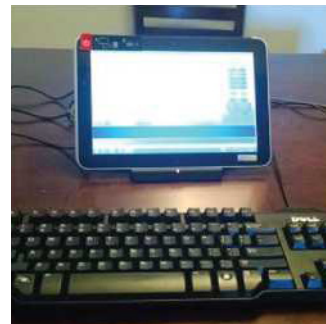
Are stored in the database and associated to the physical file folder for fast retrieval.



## MEDICAL CLINIC MANAGES HIGH-VOLUME PHYSICAL RECORDS

A busy Houston medical practice with 26,000 file records was not converting to electronic health records but still had to search and find patient folders across eight offices and three storage locations. Another requirement was the preference for a complete stand-alone system that required no network access or IT support to install.

Today, the clinic is using MasterTrak Essential for RFID tracking that included a pre-loaded tablet and docking station along with a desktop RFID Reader/Writer that automatically tracks patient files without the need for staff interaction. The stand-alone station simply plugged into two AC outlets to go live.



## BOSTON LAW FIRM NEEDS IMMEDIATE CASE FILE TRACKING

A small Boston-based legal firm needed to quickly implement a file folder tracking system that would be affordable and easy to implement based on existing barcode identification means. To facilitate its need for immediate tracking, we offered services to upload their database, provided facestock for on-site printing and extended customer training. Once all items were delivered, the client was able to track case files within a single day.



# MASTERTRAK PACKAGES



## PRODUCT LEVELS

DESCRIPTION	TRACKING METHOD	NUMBER OF USERS	RECORDS
MasterTrak Stand-Alone	Barcode & RFID	1	10,000 or less
MasterTrak Small Office 10k	Barcode & RFID	3	10,000 or less
MasterTrak Small Office	Barcode & RFID	5	Unlimited
MasterTrak Standard	Barcode & RFID	10	Unlimited
MasterTrak Enterprise	Barcode & RFID	20	Unlimited

## MODULES

- Linked Assets
- High-Density Storage Allocation
- Vertical Carousel Allocation and Management
- MasterTrak RFID Search and Find
- MasterTrak RFID Kiosks
- MasterTrak RFID Portals

## KEY FEATURES

### Scalable To Your Needs

Installed as a stand-alone system or as a network-distributed application to service multiple locations Database can be SQL Express or an existing enterprise SQL Server instance

### Quick Return On Investment (ROI)

Spend less time looking for what you need and more time working on your given tasks

### Tracking & Auditing

Easily track the location of files and conduct audits of items

### Intuitive Functionality

Common Windows® graphic user-interface, including multiple selects and functional icons

### Configure and Manage Zones and Sub-zones

Set-up your Zones, Parent Zones and Locations to match your storage environment

### Barcode and RFID Systems

Simple path to add RFID functionality to barcode system

### Full User Guide & Help system

A complete User Guide is included in the on-board help system

### Software Enhancements

Enhancements are included in release updates, available to all customers

### Flexible Hardware Options

Fixed and mobile barcode and RFID readers, handheld computers and Windows 8® tablets

### Function-Specific Kiosks

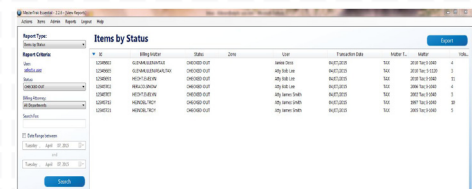
Setup, Check-in, Check-out and Storage Enroll kiosks using barcode or RFID stations

### Simple Imports and Exports

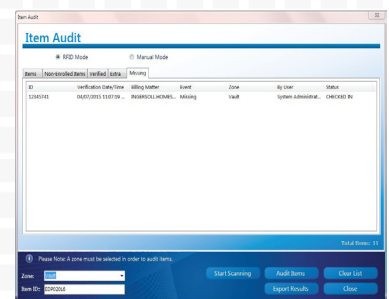
Import New Records, Zone data and Request Lists or Export records and reports via .csv files

### Pre-configured Standard Reports

Required reports and easy report filtering for tracking office assets included



Report-running screenshot



Individual item audit screenshot



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