



FileSurf® Solves Records Management Challenges



Never before has the case for records management been stronger. Due to a seemingly endless string of corporate shakeups, a wake-up call is ringing everywhere. Recent legislation such as the Sarbanes-Oxley Act of 2002, highly publicized lawsuits, and the proliferation of numerous forms of electronic documents and communications are causing organizations to re-examine their record keeping policies, practices and technical solutions.

If records are not managed properly, at risk might be the viability, integrity, status, rights of the organization, or in some cases, people's life that depends on critical information stored in a medical records system. Therefore, organizations need a records management solution that facilitates efficient and effective control over all important records, regardless of media, size or location.

MDY's FileSurf® Records Management Software is a world-class records management solution that helps organizations gain control over their physical, electronic and email records. It automates many of the manual processes of record keeping to save time and money, and empowers its end users through faster access to the right information at the right time. FileSurf has been rigorously tested and officially certified by the U.S. Department of Defense (DoD) 5015.2 (Version 2) Standard for records management software, which is increasingly being adopted by corporations and professional services organizations in a wide variety of industries.

FileSurf Capabilities

- ✓ Integrated management of physical and electronic records including emails and attachments
- ✓ Extensive retention scheduling with hold capabilities
- ✓ Powerful search functionality
- ✓ Full security, audit trails and reporting

Benefits to User Organizations

- ✓ Compliance with record keeping regulations
- ✓ Mitigation of legal risk
- ✓ Avoidance and reduction of litigation and discovery costs
- ✓ Reduction of record keeping operational costs
- ✓ Increase in overall productivity

FileSurf is designed to be flexible, scalable and extensible to address the unique records requirements of any organization, both today and in the future. Optional modules and integrations include:

FileSurf Add-on Modules

- ✓ FileSurf Document Management Modules (iManage WorkSite, DeskSite and MailSite; Hummingbird DOCS Open and PowerDOCS)
- ✓ FileSurf Imaging Module
- ✓ FileSurf Email Modules (Outlook, Lotus Notes and GroupWise)
- ✓ FileSurf Conflict of Interest Module
- ✓ FileSurf Workflow Module
- ✓ FileSurf Warehouse Management Module

FileSurf Integrations

- ✓ Microsoft Windows Explorer Integration
- ✓ Microsoft Office Suite Integration
- ✓ Digital Signature Integration
- ✓ Case Management Integration
- ✓ Time and Billing Integration

About MDY Advanced Technologies, Inc.

MDY Advanced Technologies, Inc. (www.mdy.com), has been providing state-of-the-art records, document and knowledge management solutions and system implementation services to multi-national corporations, professional service organizations and government agencies since 1988. MDY's unique mix of software plus services gives organizations a single point of accountability in gaining complete control over their information management needs, reducing risk, complying with state and federal regulations, and effectively implementing knowledge management policies, best practices and procedures.



FileSurf® Solves Records Management Challenge For Corporations



“Before using FileSurf, our records management process was labor-intensive, time-consuming, and prone to errors. Since we started using FileSurf, the process has been improved and streamlined dramatically, and we are saving significant costs. We are confident that our record keeping system not only complies with all regulatory and legal requirements, but also supports our business initiatives and helps us get more work done faster.”

A Corporate Client

With the storm of recent corporate embarrassments regarding document and email handling and the evolving legal and regulatory environment for corporate accountability, companies must manage their information with thoughtful and careful stewardship. The challenge is how to efficiently and effectively manage all business records to protect the company, reduce legal risk, lower operational costs and improve employee productivity and decision making.

MDY's FileSurf® Records Management Software is a world-class enterprise records management solution that helps corporations gain control over their physical, electronic and email records. It automates many of the manual processes of record keeping to save time and money, and empowers its end users through faster access to the right information at the right time. FileSurf has been rigorously tested and officially certified by the U.S. Department of Defense (DoD) 5015.2 (Version 2) Standard for records management software, which is increasingly being adopted by corporations and professional services organizations in a wide variety of industries.

FileSurf Capabilities

- ✓ Integrated management of physical and electronic records including emails and attachments
- ✓ Extensive retention scheduling with hold capabilities
- ✓ Powerful security, search and reporting functionality
- ✓ Flexible corporate file plan structure
- ✓ Unrivaled scalability, extensibility and flexibility
- ✓ Excellent usability

Benefits to Corporations

- ✓ Compliance with government and industry regulations
- ✓ Reduction of legal risk and litigation costs
- ✓ Control of records management costs
- ✓ Increase in end-user productivity by sharing records quickly and easily
- ✓ Increase in profitability

FileSurf's leadership is built upon years of experience in developing and implementing complete information management solutions for many of the world's largest and most prestigious corporations in financial services, manufacturing, pharmaceuticals, consumer packaged goods, telecommunications, energy and utilities, media and entertainment, retail and healthcare. MDY employs a number of former attorneys and records managers who work directly with companies throughout the entire project implementation – from early consulting and planning through installation, configuration, data migration and administrator and attorney training. Through their detailed understanding of the corporate records landscape, MDY's staff also provides thought leadership and specific marketplace direction to future FileSurf enhancements.

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FileSurf® Solves Records Management Challenges For Law Firms



“FileSurf saved us from suffocating in our own electronic records and email. MDY advised us on exactly what technology we needed and had the system running in record time. Since then, we have improved client relationships and our clients are even accessing their electronic records through an extranet connected directly into FileSurf. MDY and FileSurf exceeded our expectations in every way.”

Steve Bronstein, Venture Law Group

One of the key challenges facing law firms today is to grow and remain competitive in a demanding and changing business and legal environment. A significant part of this challenge is how to respond faster to client issues while the firm’s resources are already overburdened. What’s needed is a records management solution that puts client matters and relevant information at the attorney’s fingertips so they can protect and defend their clients to the best of their abilities.

MDY’s FileSurf® Records Management Software is a world-class records management solution that helps leading law firms gain control over all physical, electronic and email records. It saves significant administrative time and money by automating many of the manual processes of record keeping, and empowers attorneys through faster access to the right information at the right time. With more timely legal service, clients are more satisfied with their legal experience and more likely to bring additional matters and referrals into the law firm.

FileSurf Capabilities

- ✓ Proven capabilities to manage legal records
- ✓ Secure ethical walls
- ✓ Thorough conflict of interest checking
- ✓ Seamless legal practice workflow
- ✓ Unparalleled flexibility and excellent usability for attorneys, paralegals and administrators

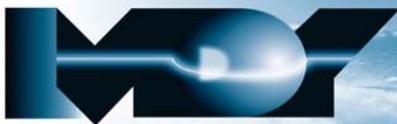
Benefits to Law Firms

- ✓ Increase in productivity
- ✓ Increase in profitability
- ✓ Improved client satisfaction
- ✓ Reduction of record keeping labor and storage costs
- ✓ Compliance with regulations pertaining to the legal services profession

FileSurf’s leadership is built upon years of experience in developing and implementing complete information management solutions for many of the world’s largest and most prestigious law firms. MDY employs a number of former attorneys and records managers who work directly with the law firm throughout the entire project implementation – from early consulting and planning through installation, configuration, data migration and administrator and attorney training. Through their detailed understanding of the legal marketplace, MDY’s staff also provides thought leadership and specific legal marketplace direction to future FileSurf enhancements.

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FileSurf® Solves Records Management Challenges For Government Agencies

“FileSurf gave us complete control over the volume and complexity of our records. Using FileSurf, we have achieved significant cost savings, tight integration of physical and electronic records, and increased responsiveness to our constituents’ records and information needs. In addition, MDY’s FileSurf has improved our overall productivity and service to the public.”

A Government Agency Client

Government agencies at all levels face an increasingly strategic and unavoidable challenge – managing government records for the benefits of their employees and the public. Agencies must find a solution to efficiently and effectively manage all government records, physical, electronic and email, to protect the integrity and privacy of the information as well as serve the public’s needs.

MDY’s FileSurf® Records Management Software is a world-class records management solution that helps government agencies gain control over all physical, electronic and email records. It saves significant administrative time and money by automating many of the manual processes of record keeping, and empowers employees to provide better and more responsive public service through faster access to the right information at the right time.

FileSurf Capabilities

- ✓ Official certification by the US DoD 5015.2 (Version 2) Standard, and Section 508 Compliant
- ✓ Proven capabilities to manage all government records
- ✓ Integrated management of physical and electronic records including emails and attachments
- ✓ Powerful security, search and reporting functionality
- ✓ Excellent usability for both administrators and end users

Benefits to Government Agencies

- ✓ Compliance with regulations
- ✓ Strong support for e-government initiatives
- ✓ Control of records management costs
- ✓ Increase in government productivity
- ✓ Improvement in speed and quality of public services
- ✓ Reduction of legal risks and costs

FileSurf’s leadership is built upon years of experience in developing and implementing complete information management solutions for numerous government agencies. MDY employs one of the co-authors of the original U.S. DoD 5015.2 Standard, as well as a number of former attorneys and records managers who work directly with agencies throughout the entire project implementation – from early consulting and planning through installation, configuration, data migration and administrator and attorney training.

Leveraging proven project management skills and deep technical expertise, MDY has successfully and consistently deployed FileSurf and other information management solutions in many government agencies, such as Army Board of Review, Classified Government Agency, Environmental Protection Agency, General Services Administration, New York Dept of Design and Construction, New York Housing Authority, Queens County Clerks Office and U.S. Justice Department.

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FileSurf[®] Document Management Modules

FileSurf[®] Document Management Modules extend the power and flexibility of FileSurf records management solution into an organization's Document Management System (DMS). These modules provide complete and seamless records management functionality from inside the DMS. Any draft, revision or version of a document can be declared as a record, profiled, and saved as an uneditable record in the FileSurf Repository. FileSurf integrates with iManage WorkSite, DeskSite and MailSite, as well as Hummingbird DOCS Open and PowerDOCS.

Integrated Management of Documents and Records

FileSurf Document Management Modules provide:

- **Complete Lifecycle Management of Information** – Integration of document management systems and the FileSurf records management solution completes the full lifecycle of information – from creation to retention scheduling and final disposition. Harnessing the power of this tight integration, organizations can greatly enhance employee collaboration and productivity as well as protect organizational integrity and viability.
- **Authentic Records Preservation** – Once declared as a document of record, a document is preserved as a “record” and cannot be changed or altered in any way. Maintaining the authenticity of records is one of the basic requirements of sound records management system. Alternatively, active documents may be “linked” to FileSurf for disposition without locking the document as a document of record.
- **Robust Retention and Hold Capabilities** – The FileSurf Records Management Solution adds powerful records management functionality to the DMS system, such as assigning retention rules and disposition reviews and implementing “holds” to override scheduled disposition. Complete audit trail information is retained during the record lifecycle as well as after the record has been properly disposed. By doing so, FileSurf helps organizations meet the special needs of records management and significantly reduce legal risks.
- **Secure Ethical Walls** – With strictly enforced ethical walls powered by FileSurf's strong, secure access control capability, users can confidently share useful information and best practices among designated parties with no worry about breach of trust and violation of privacy rules.
- **Easy Sharing of Functions** – Many features and functions of FileSurf, such as searches and Conflicts of Interest checks, are performed against all documents and records stored in the FileSurf Repository as well as the DMS. This tight integration enhances the value of both systems.

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FileSurf® Email Modules



MDY's FileSurf® Email Modules are seamlessly integrated with Microsoft Outlook, IBM Lotus Notes, and Novell GroupWise to provide records management capabilities from within these email applications. Email users can properly declare and manage incoming or outgoing email as an official document of record, and store email and attachments in the FileSurf Repository. Retention schedules, holds, and many other records management functions can be quickly and easily applied to emails in the same manner as to physical and electronic records.

Solving the Email Records Challenge for Email Users

The FileSurf Email Modules provide an innovative and effective email records management solution that cannot be matched by email applications, email archiving systems or document management systems.

- **Proven Capabilities to Meet Email Records Management Requirements** – FileSurf Email Modules integrate all filed email records into the FileSurf Repository and manage them as official documents of record. Using these Modules, organizations maintain email records authenticity, implement unified retention policies, enable disposition hold, and generate complete audit trails of email records. Treating emails as un-editable records is a key differentiator for FileSurf and a significant value-add for its users.
- **Easy, Fast and Flexible Filing** – FileSurf Email Modules create a hierarchy of folders within the email applications. Email users can easily file received emails and their attachments as records directly into any the folders. Outgoing emails can be filed as records at the moment they are sent or at a later time from the *Sent Items* folder. Email attachments can be filed with the email, or declared and profiled as separate records linked to the email. Email record profile information is automatically populated into the FileSurf Electronic Mail Profile. These options provide an extremely easy, fast, and flexible system that requires little or no end-user training and time.
- **Intelligent Email Records Management** – When an email is declared as a record, FileSurf Email Modules perform an intelligent verification to ensure it is a new and unique record. If the same user or any other user previously filed the email as a record, FileSurf Email Modules will avoid filing an unnecessary duplication. This mechanism prevents redundancies and optimizes email records storage and management.
- **Powerful Search, Retrieval, Viewing and Reporting Capabilities** – FileSurf enables quick, easy and accurate search and retrieval of email records, as well as physical and electronic records. Users can conduct searches within textual content or records profile fields at either basic or advanced levels. Users can view recorded emails and their attachments in their native applications or in HTML format, and generate standardized or customized reports.

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FileSurf[®] Imaging Module



The FileSurf[®] Imaging Module provides organizations with an effective solution for the capture and transformation of physical documents into digital information. FileSurf manages the converted documents as records and integrates them into the FileSurf Repository. Combining document imaging with records management, FileSurf helps organizations gain easy and instantaneous access to the electronic equivalents of physical records.

Powerful Transformation Solution

FileSurf offers a high-performance solution to transform physical documents into their electronic equivalents. The FileSurf Imaging Module, combined with imaging system, provides corporations, professional services firms and government agencies with the solution they need to implement their digital initiatives. Through this flexible and efficient solution, organizations gain the following benefits:

- **Complete Document Imaging Process** – The FileSurf Imaging Module integrates seamlessly with Kofax Ascent Capture and other industry-leading imaging systems to facilitate the end-to-end process of physical document imaging – from capturing to viewing, from indexing to retrieving and from storing to routing. The Imaging Module streamlines the conversion of large numbers of paper-based documents into electronic records to dramatically reduce the amount of labor and resources needed to profile, image and store large numbers of physical documents.
- **Consistent Records Management Functions** – Once in the FileSurf Repository, the electronic records are managed completely and consistently according to the organization's file plan. Physical file profiles are also stored in the FileSurf Repository to maintain the status, location and audit trails of the original physical documents. By keeping track of both the physical files and their electronic equivalents through a single virtual repository, a single user interface and a single search facility, organizations gain complete control of their records, regardless of media type.
- **Increased Productivity** – Electronic equivalents of physical documents enable easy and instantaneous access, searching and routing for all authorized individuals. Waiting time and contention for physical documents is completely eliminated, as is the administrative labor and costs needed to satisfy physical records requests. In addition, end users can rest comfortably knowing that they are using the latest version of a record, rather than waiting for an updated physical document to be copied or routed to them. This translates directly into a significant productivity gain for both records administrators and all end users.
- **Reduced Cost of Physical Records Management** – Imaging physical documents and using the electronic equivalents helps organizations significantly reduce the physical space requirements for filing, retrieving, reviewing and managing multiple copies of paper documents. Original hardcopy files can be moved to lower cost off-site storage facilities where they will be handled much less frequently, freeing up valuable office space for more productive tasks.

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FileSurf® Warehouse Management Module



The FileSurf® Warehouse Management Module provides an effective solution for organizations that manage or outsource a physical records warehouse operation. The Module provides comprehensive and powerful functionality to ease the administrative burden of managing records center and warehouse space, track the lifecycle of work orders and simplify billing processes.

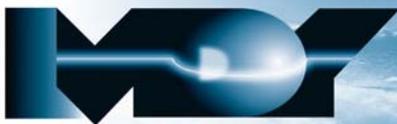
Complete Control over Records Warehouse Operations

The FileSurf Warehouse Management Module helps records managers gain complete control over all activities and processes associated with physical records warehouse operations. Using powerful tools provided by FileSurf, organizations can easily integrate all kinds of records regardless of form or media and manage them in a consistent and disciplined manner.

- **Efficient Space Management** – Using the FileSurf Warehouse Management Module, records managers can define and maintain precise size dimensions of each of the organization’s storage containers. In addition, they can use this module to define internal users (business units/divisions, departments, offices, individuals, and records managers) as well as authorized external parties. By assigning physical file storage locations using the “next available space” or “best fit” methodologies, records managers can optimize physical space configurations and minimize associated costs. Records managers can use Module to generate a full set of standardized and/or customized reports, which provide a comprehensive view of overall space utilization, storage activities such as retrievals and deliveries, inventory verification, access history, and storage-related activities by department, group or user. Powered by these capabilities, records managers reduce the time spent trying to efficiently utilize space so they can put more energy into other critical records management issues.
- **End-to-End Tracking of Work Orders** – The FileSurf Warehouse Management Module provides powerful tracking tools, from work order creation to final fulfillment, for a wide variety of work orders. All interim steps and time periods are completely noted to calculate storage and service fees according to the established rate tables. With end-to-end tracking capability, records managers gain better control of work orders and improve service speed and quality.
- **Strong and Flexible Billing Capabilities** – Using the FileSurf Warehouse Management Module, records managers can also quickly and easily set-up detailed Accounts, Services and Rate Tables for their unique environment. They can run reports and generate invoices or bills for any physical storage location, any set of documents, any time period, or any business unit. All storage fees and records warehouse activities can be itemized and charged-back to each business unit, department, office or individual.

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FileSurf® Conflict of Interest Module

The FileSurf® Conflict of Interest Module provides a complete and powerful tool to ensure the integrity of all relationships with new and existing clients, matters, partners and business associates. This specialized search engine quickly and completely identifies potential conflicts of interest before establishing a new business relationship. Proactively checking conflicts before the engagement will not only save real time and money, but also help avoid potential fines and embarrassments.

Thorough Conflict of Interest Checking

The Conflict of Interest Module provides complete control of conflicts checking through powerful and flexible searching. Users can perform simple or advanced searches across multiple internal and external databases, such as InterAction and LexisNexis, to ensure that all possible conflicts are identified.

- **Versatile and Flexible Search Functionality** – Users have the option to specify search domains on which they want to perform a conflict of interest check. Simple checks can be easily performed without using any search criteria, whereas advanced searches can be conducted by specifying search domains, such as Scope, Preferences, and Pattern.
 - Scope Search: Users can specify the Forms and the text data fields, such as Client Name and Notes, Matter Name and Description, Folder Title and Notes, Document Subject and Content, and Box Name and Description.
 - Preferences Search: Users specify for which other user, for which client, within what dates, on which types of relationship, or on which directions of relationship, the search is being conducted.
 - Pattern Search: Users can specify letters, words, phrases, numbers or spaces as search criteria.
- **Powerful Search Mechanisms** – The Conflict of Interest Module harnesses the power of a number of commonly used search techniques, such as Boolean logic operators, stems, wildcards, fuzzy logic, phonics, synonymy, within, and not within. Using these techniques, users can conduct sophisticated searches to ensure that all possible conflicts are identified.
- **Comprehensive Options to Filter the Search Results** – Users can filter search results based on criteria such as dates, parties, and/or scope. The Module provides the ability to save and re-use search patterns, together with their results, to minimize replication and save time. Users can also compare results of two searches to identify the differences, if any, which can be included in a report.
- **Flexible Report Creation** – The Conflict of Interest Module instantly generates pre-formatted reports to show potential conflicts. Users can choose any of the three format options: Full Report, Full Report with Hyperlinks, and Detailed Report. Customized reports can also be created to meet the unique requirements of any user.

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FileSurf[®] Workflow Module



The FileSurf[®] Workflow Module provides an effective tool for organizations to streamline the business processes associated with record keeping and records management. By improving and automating internal records processes, organizations will save significant time, resources and costs, as well as dramatically improve the productivity and responsiveness of end users.

Automating and Streamlining Records Management Processes

The Workflow Module delivers seamless, automated records management workflow to intra-company and inter-company business processes. By automating workflow, records management functions, such as records creation, review, approval and auditing, can proceed at the click of a button, rather than wait on physical routing or other manual processes. The time saved through automation can reduce some records processes from days or weeks to minutes or hours.

- **Flexible Workflow Design** – The FileSurf Workflow Module enables operational, legal and technical people involved with records management to define and map processes, rules, procedures, tasks, events, participants, and privileges through a graphical user interface (GUI) to automate the flow of records in an organization. The capability and flexibility of visual process design lays a solid foundation for conditional, ad hoc and predefined routing of records as they are needed for various business functions.
- **Intelligent Routing** – The FileSurf Workflow Module establishes workflow logic utilizing unique “data fields” that are dynamically assigned values based on states, conditions and calculated formulas. In addition, data fields can be dynamically set based on cumulative results from individual reviews and approvals (special “voting rights”) to determine the next action or route to take in process flow. FileSurf can send alerts to specific individuals or groups to notify them about certain events (such as conflict of interest checking, scheduled archiving or disposition, audit trail request) or exceptions (such as disposition hold). The workflow system can determine how to proceed and which specific route to take throughout the predefined business process. In so doing, it effectively relieves or even prevents a variety of bottlenecks.
- **Workflow Status Monitoring** – Workflow participants can log into the workflow Website using a standard browser to see assigned tasks, review status and timing of process states, and fulfill responsibilities based on predefined roles and privileges. Users can monitor and track all active work processes, measure productivity and response times of individuals and groups, and manage records management and related performances throughout the organization. Instantaneous workflow monitoring provides intelligent information about the status of any work item, shows preceding and next steps in the process and identifies any bottlenecks that might need special exception handling.
- **Extensible Integration** – The FileSurf Workflow Module can be tightly integrated with leading email systems and other business applications to provide a comprehensive and extensible solution for records workflow.

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FileSurf[®] Records Management Services



MDY Advanced Technologies, Inc. offers a full range of services for its flagship records management software product, FileSurf[®]. FileSurf is a world-class records management solution that helps organizations gain control over their physical, electronic and email records. It automates many of the manual processes of record keeping to save time and money, and to empower its end users through faster access to the right information at the right time. FileSurf has been rigorously tested and officially certified by the U.S. Department of Defense (DoD) 5015.2 (Version 2) Standard for records management software, which is increasingly being adopted by corporations and professional services organizations in a wide variety of industries.

The services for FileSurf software include consulting, implementation, training, and ongoing customer support.

- **FileSurf Records Management Consulting Services** – MDY understands that records management is more than the deployment of a set of tools. Records management is an organization-wide business strategy and process that utilizes the right technology to protect organizations from public embarrassments, legal liabilities and financial penalties. Records management also enhances knowledge management and overall productivity for organizations. In order to achieve such strategic goals, organizations need to manage all records in a disciplined and consistent manner by developing and implementing appropriate records management policies, procedures and best practices. MDY understands this need and strongly emphasizes the importance of full planning and preparation before any software implementation. As a trusted records management advisor, MDY has helped a large number of clients with their records system audits, needs assessments, file plan development, records process training and many other key issues.
- **FileSurf Implementation Services** – MDY provides implementation services that are second to none in the industry. MDY's dedicated and talented project management team serves as a single point of accountability from start to finish, including project planning, data conversion, records setup, configuration, customization, and desktop integration. The MDY project team delivers unsurpassed assurance of complete project success and full client satisfaction.
- **FileSurf Training Services** – FileSurf training services include education and training for both administrators and end users to give organizations a faster and greater ROI. These well designed and delivered training sessions provide a full set of materials that are customized and personalized to meet the unique needs of each client organization.
- **FileSurf Support Services** – MDY's support staff consists of records and systems experts who are readily available to answer any questions about FileSurf via telephone, fax or emails. Customers can obtain support during regular business hours (9 a.m. to 5 p.m. local standard time, excluding MDY Holidays), as well as non-business hours.

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