

ASH ST.

FILE CADDY
“KNOW WHAT’S IN STORE”





ALL ORGANISATIONS HAVE TO STORE AND ACCESS ESSENTIAL DOCUMENTATION TO ENSURE GOOD CORPORATE GOVERNANCE.

THE PROBLEM FOR MOST ORGANISATIONS IS THAT THIS INFORMATION IS STORED IN DISPARATE LOCATIONS AS PAPER OR ELECTRONIC FILES. IT IS ALL TOO EASY TO MISS KEY ACTION DATES ON DOCUMENTS AS THEY ARE NOT FRONT OF MIND UNTIL IT IS SOMETIMES TOO LATE.

There needs to be a solution that brings together this documentation in one easy to access location, is actively monitored for key events and can be made available to authorised internal and external stakeholders at a moment's notice.

Ash St.'s File Caddy solution was developed to exactly meet such a need.

FILE CADDY



File Caddy is a solution built upon one of the world's leading cloud storage solutions to enable Ash St. to monitor key client documents so you can concentrate on the business of running your organisation. Key features include:

- Storage
- Search
- Alerts
- Access control
- View by device
- Security

The next two pages expand on these features in more detail.



STORAGE

File Caddy can store any type of corporate documentation including original MS Office files as well as PDF and multi-media files. Ash St. recommends source electronic documents where possible to speed uploading otherwise a scan of the paper files.

SEARCH

File Caddy uses advanced searching algorithms including keywords in file names and metadata tags. This ensures key documents can be found quickly and precisely. Ash St. has developed a file naming convention and guide for metadata tags.



ALERTS

File Caddy permits the addition of an alert or multiple alerts by date and user or multiple users. These users receive email alerts on the due date as well alerts on the user logon Dashboard and a parallel email to the user administrator. Alerts stay open until actioned with a full audit trail.



ACCESS CONTROL

File Caddy provides admin- and manager-level access control by default for uploading and categorising documents. In addition any folder or file can be viewed by certain users or users types enabling almost unlimited control of access to documents.



VIEW BY DEVICE



File Caddy is based on a cloud storage system and documents can be viewed on any browser on any operating system (macOS, Windows, Chrome OS). File Caddy also uses an App for Apple iOS and Android devices. This enables viewing using your PC, phone or tablet, anytime, anywhere.

SECURITY

File Caddy is secured by world-class security standards including encryption, multiple data centres and backup systems. The solution also provides a security dashboard with full logs and audit trails of activity as well as fully configurable logon controls.





DOCUMENT TYPES

File Caddy allows any document type to be uploaded and Ash St. has developed a tested list of document types and will pre-load the File Caddy folder structure.

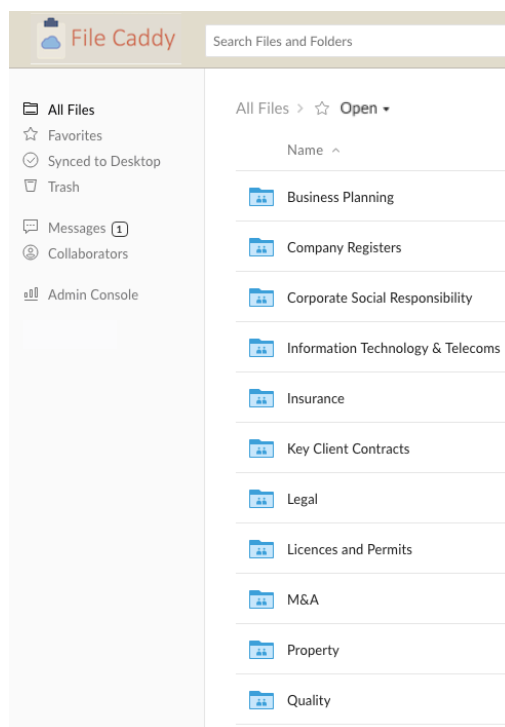
In addition Ash St. will add any requested user folders that are specific to a particular organisation or industry.

FILE CADDY HAS TWO MAIN DOCUMENT MODES: OPEN AND RESTRICTED.

OPEN DOCUMENTS ARE FREELY AVAILABLE TO VIEW BY CLIENT USERS AS THE INFORMATION IS CONSIDERED NON-SENSITIVE AND USEFUL FOR DAY-TO-DAY BUSINESS OPERATIONS.

RESTRICTED DOCUMENTS ARE ONLY AVAILABLE TO BE VIEWED BY NAMED INDIVIDUALS OF THE CLIENT AS THE CONTENT MAY BE PARTICULARLY SENSITIVE.

File Caddy can also act as an electronic data room at no extra cost with almost unlimited storage. This could save thousands of dollars compared to commercially available electronic data rooms in addition to the effort of uploading all of the documents again.



IMPLEMENTATION



Day 1

- Agree scope of documents to store
- Set up users and access controls

Weeks 1-2

- Scan and upload electronic documents to Ash St.'s pre-defined folder structure
- Add metadata to documents to enable quick searching
- Ash St. to set diary alerts for key contract actions or compliance dates

Week 3

- Train key client users on viewing documents
- Set-up regular review meetings including annual review

Ad-hoc

- Add new documents
- Periodic Ash St. review meetings
- Correspondence on key document actions



FILE CADDY IS STRAIGHTFORWARD TO IMPLEMENT. IF ASH ST. ALSO HOSTS YOUR REGISTERED OFFICE WE ARE ABLE TO PRE-LOAD YOUR CORPORATE REGISTER AS WELL AS RELEVANT CORPORATE DOCUMENTATION WE ALREADY HOLD.

Ash St. also sets diary alerts for key document events. We will prepare our recommendations to you including any options and suggested paperwork giving clients plenty of time to make decisions without feeling the pressure of deadlines.



PRICE

Ash St. provides the File Caddy solution for a fixed price of \$499 per month including the software license, a one-off bulk upload of documents, the diary monitoring fee and periodic client review meetings.

TERMS

We will invoice monthly in advance plus GST for a minimum period of 12 months and thereafter monthly with a minimum notice period of one month. Any requests for additional legal work will be accompanied by a Costs Letter.



“KNOW WHAT’S IN STORE”

File Caddy is the market-leading solution to ensure your corporate documentation is collated, categorised and actively monitored, freeing you to concentrate on the business of running your organisation.



CLIENTS

ASH
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Other clients in Beta testing



"WE HAVE FOUND FILE CADDY TO BE
ESSENTIAL TO MANAGE OUR CORPORATE
AFFAIRS AND HAVE ALREADY FOUND
ACTION ITEMS WE HAD MISSED."

LYN WOODS, CEO ASH ST.

ASH ST.

THE NEW WAY
IN PROFESSIONAL SERVICES

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