

CASE STUDY

Physical Records Identification, Classification, and Relocation

 **INDUSTRY**
Energy

 **COUNTRY**
USA



NOT ENOUGH ROOM FOR IT ALL

As the move-in date approached for a new expansive corporate headquarters, it became apparent to this client that their new location did not have sufficient storage space for all of the existing physical records accumulated over decades of operation.

Recognizing the vast scope and urgency of this effort, our client turned to us, their long term provider and trusted advisor. Access Sciences was engaged to assess, classify, index, cull, pack, relocate, and shelve the records into a new centralized records center.

Additional challenges included:

- Different business lines managed their physical records in various ways ranging from professional records management methodologies and staff, to local workroom and file room collections that were not actively managed, necessitating a flexible approach by our team

ISSUE

Lack of storage space required the indexing and relocation of records into a new facility

- The volume of existing paper records (more than 10 linear miles) necessitated the coordination and synchronization of multiple, parallel work teams
- The need to determine the disposition status of each record quickly and accurately
- Consolidating and indexing the records to be moved so that they conformed to a common classification system

- The requirement to maintain a definitive chain of custody so that a specific record could be accounted for at every step in the process

SERVICES DELIVERED:

- Content Analysis
- Content Classification
- Content Migration
- Record Center Operations



- The ability to locate and retrieve an in-process record in the event that it was needed in real-time

AGILE PROJECT TEAM WITH EXPERTISE AND FLEXIBILITY

Using Access Sciences' Agile Project Management methodology, our team was able to proactively adjust our procedures and processes to meet the ever-changing needs of this client/project. After meeting with client sponsors to confirm scope and logistical requirements, we:

- Performed an assessment of all existing records at each facility so they could be identified and classified according to the client's records retention schedule
- Determined the disposition of each record as active, inactive, or convenience
- Separated inactive and convenience records for further processing by the client
- Bar coded, labeled, re-folded, shipped, and received all active records (approximately 1 linear mile) to the new centralized facility
- Maintained chain of custody and tracked the records as they transited from their former locations to the centralized facility
- Shelved the newly received records at the centralized facility
- Created an updated electronic list of relocated records and updated the client's records management system

SOLUTION

- ☑ Using the Agile project management method, the team assessed, classified, indexed, culled, packed, relocated, and shelved 10 linear miles of physical records into a new centralized records center
-

ONE LINEAR MILE OF ACTIVE PHYSICAL RECORDS MOVED...ON-TIME, ON-BUDGET, AND WITH A SATISFIED CLIENT

Rapid and accurate relocation of the client's physical records enabled uninterrupted operations, consolidation of their information assets, and classification into a well-structured repository for quick and accurate access and management. During the course of the project, we:

- Assessed, classified, and separated more than 10 linear miles of physical records
- Processed, shipped, and shelved approximately 1 linear mile of active records
- Enabled a more transparent records management process
- Provided training on records warehouse organization and management
- Aided business lines in developing file schemes to make records more accessible

BENEFIT

- ✓ **Rapid and accurate relocation of the client's physical records enabled uninterrupted operations, consolidation of their information assets, and classification into a well-structured repository for quick and accurate access and management**

After the completion of the project, the client possessed an accurate inventory and location of all of their relocated active records. Access Sciences established a relationship with the client as a trusted advisor by exceeding client expectations for quality, completing project objectives under budget, and within the established time-frame.

