

OUT CARDED FILE BOXES

Steps to stop paying for storage on retrieved off-site inventory:

1. Download (or request from your account rep) an inventory report that captures all metadata, but at a minimum ensure the following elements are provided:
 - a. Box barcode/RFID #
 - b. Status
 - c. Last activity date
 - d. Date originally sent to storage
 - e. All content description fields
2. Filter box status for those that are out carded (“out” or “customer” – term varies by provider).
3. Sort by last activity date.
4. Select an age-based threshold for permanent withdrawals (PW), consider anything out of storage for more than twelve months.
 - a. **12 to 24 months:** Follow up with requestors and action PW based on their response.
 - b. **24+ months:** Skip requestor follow up; submit PW in your provider’s online system or email Excel list to your account rep.
5. Ensure the individual overseeing records duties establishes a regular cadence for reviewing inventory reports, typically every six to twelve months.

Tip: Every provider uses slightly different jargon for activity status, and you may need to request a legend from your account rep or the customer care department. As an example, some VRC inventory reports only list a single alpha character for Status. Some VRC codes are obvious (D = destruction) while others are unclear (V = permanently withdrawn). Further, any of the following VRC status codes indicate that the box is at their warehouse: In, In Bay, Put Away.

PRODUCTION SCANNING SOFTWARE

Platforms offered by DocSolid, nQ Zebraworks, and Upland further streamline scanning workflows by allowing large scanning batches to be prepared and processed at once. Quality control workflows can be enabled in these solutions. Upland is the most economical but lacks some of the functionality available in the alternatives, such as an automated email “digest” that consolidates all mail or records received while allowing customized recipient routing preferences.

DocSolid’s products are Digital Mailroom and Digital Records Room, supported by their AirMail2 platform. nQ Zebraworks’ products are MailQ and RecordsQ. Upland’s product is AccuRoute.

PRODUCTION SCANNING HARDWARE

Generally speaking, one tabletop scanner for every three centralized workers will suffice. Unless the centralized Office Services or Records teams are comprised of 4 or more individuals, Mattern finds that scanners sit idle for extended periods when there is more than one device given these teams have other duties to fulfill throughout the day. Additionally, the scanning workflow is divided between three main components, each of which consumes approximately the same amount of time. This allows a team of 3 to work on the same scan job concurrently without the need for a second device:

1. **Prep:** Binding element removal, pre-profile to DMS destination with slipsheets
2. **Scan:** Feed hard copies, address device stoppages, resolve quality control issues
3. **Quality Check:** Verify no dog-eared corners, no lines on pages, release PDFs to DMS

Scanner Models to consider

The following models are equipped with multi-feed detection (aka “ultrasonic page thickness detection”) and are either equipped with an integrated flatbed or offer a flatbed as an accessory:

- **Canon DR-G2110** – recommend adding the “Flatbed Scanner Unit 202” (USB-connected 11”x17” flatbed scanner accessory)



- **Kodak S3100f** (integrated 8.5”x14” flatbed scanner surface)



- Ricoh fi-7700 (integrated 11"x17" flatbed scanner surface)



- Ricoh fi-8270 (economical alternative to the fi-7700: lighter duty, smaller 8.5"x11" flatbed)



- Xerox W130N – recommend adding the “DocuMate DM4700” (USB-connected 11"x17" flatbed scanner accessory)

