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eOrganizedWorld  
the Online Information Management Newsletter  
for Information Professionals  
from Charlie Sodano

### The File Room

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No, the file room is not where you go to get your fingernails done. The classic image of a file room is an endless corridor filled with labeled shelves, cabinets and boxes (like in Indiana Jones, remember?). Many file rooms like this still exist today and probably will for some time to come. The management of the traditional file room was left in the hands of a custodian who, on request, filed away or retrieved records for their clients. In the past, file room organization was often left to the whims of the custodian. When the custodian retired it often took their replacement a long time to figure out the “system”. For many organizations the maintenance of legacy paper records is still necessary, because their retention times are long. More than 95% of all records today are generated electronically, whereas 20 years ago (1990’s) the percentage was much less, around 70%.

For the past 20 years or so, most people have been composing and finalizing their own documents, rather than delegating it to a secretary/typist. There are still a few people around who rely on a secretary or admin, but most higher level people in an organization compose and finalize their own documents these days. I had a friend that was recently sitting next to a man on an airplane who was reading a sheaf of printed email messages and making notations on them with a pencil, presumably to give to an admin to reply to the sender. This is a dying breed.

So who is the custodian of the records that need to be shared with others in an organization? If the files are kept on a share drive or partially developed SharePoint location (it often seems like most are partially developed!), this responsibility often falls to an admin who becomes the custodian responsible for the records of a lot of people. That’s one scenario. If an organization had implemented some kind of working content management system, chances are that a custodian has been defined for certain types of records (regulatory) and other types are left to personal whim. The inevitable result of these practices is chaos when personnel changes occur.

The new custodian will probably be thrust into an active role because of pending litigation or some updated contractual agreement. They will probably be baffled by the filing “system” that their predecessor used and will normally continue with it, adding new record categories to the prior ones. The next custodian will thereby inherit an archive that is doubly confusing.

How do you fix this? It’s actually pretty simple and there are benefits other than knowing where vital records are stored. Develop a records retention file plan that groups records having the same retention times into a small number of folders. Start simple. You can always expand the categories later. The records plan should be agreed and understood by all who are contributing to this repository. The only other thing that needs to be added at the end of every year is an additional subfolder identifying records belonging to the new year. That’s it! Not rocket science. New contributors’ are trained by the custodian on the logic of the system. When a record is due for destruction approval, it is easily located because of the yearly subfolders. This is a poor man’s

record management software. Filing information by year works great. You all should do this for your personal records too. Keeps things from getting clogged up with outdated information

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Contact us ([consultants@eorganizedworld.com](mailto:consultants@eorganizedworld.com)) for additional information about getting your records management program started. We'll give you more free advice and explain how we can continue to work together.

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**What's new?**  
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**Information Management Updates**

A2iA developer of tools for handwritten and machine-printed text recognition, data extraction, and the intelligent classification of paper documents, announced that A2iA FieldReader(tm), its proprietary toolkit designed for extracting information from structured and semi-structured forms, has been integrated into BOLT Document Management's Bolt Script. Bolt Script, a software add-on that enables Laserfiche(r) ECM users to incorporate handwritten documents into their workflow, can be applied to a multitude of verticals including banking, finance, healthcare, insurance, government, manufacturing, education and utilities.

Ricoh Americas Corporation announced the launch of the next generation of its Personal Paperless Document Manager (PPDMv2). Equipped with more robust and dynamic features, PPDMv2 software converts scanned paper documents into electronic files and routes them to any destination via custom workflows created from a desktop computer. PPDMv2 can accommodate Ricoh, Savin and Lanier branded products.

OpenText announced it had entered into an agreement to merge Metastorm, the Baltimore-based provider of business process management, business process analysis, and enterprise architecture software, with a subsidiary of OpenText. MetaStorm's document-centric workflow technology makes it a logical acquisition for Open Text, and both companies target document-heavy industries such as the legal sector.

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