box-it ®

documents are our business

Cataloguing

Take the guesswork out of archive management. Know exactly what's in your archive boxes down to individual files. Box-it's professional cataloguing services provide the backbone to compliant document lifecycle management and best practice.

Many public and private sector organisations who choose Box-it as their preferred partner for outsourced records management, take advantage of our comprehensive cataloguing services. Through our cataloguing application, we provide highly accurate, cost-effective services resulting in tighter control of archived records.

Accurate, consistent cataloguing is critical to efficiently and compliantly managing archived records. Many organisations choose to outsource this time-consuming task, especially given the knowledge and resources that are needed to conduct this effectively. Such a strategy becomes a practical and cost-effective option, with trained staff at Box-it being guided initially by your 'knowledge worker'.

Box-it provides records management services to clients from advice on best practice to actual records taxonomy, and the cataloguing process itself. We have a state-of-the-art, highly secure central cataloguing facility managed by experienced and knowledgeable staff. At Box-it, we have used our vast experience in digital data capture to develop our innovative cataloguing application with powerful validation features. This enables us to capture data from archived records at either file or box level, with exceptional accuracy and inputting efficiencies. We manage projects of all sizes.

Our application is also fully integrated with our archive management systems, and user records management interface,O'Neil Orders a platform which allows you to manage all your physical archives securely online. Secure document storage and confidential destruction services are available at Box-it.

boxit-northscotland.co.uk

Cataloguing

Box-it provides a total solution for physical archive management, including professional cataloguing services. Over recent years, we have catalogued hundreds of thousands of files for clients ranging from private enterprises and multi-nationals, to NHS departments and other public sector organisations. We handle all types and sizes of cataloguing projects.

Our central cataloguing facility is a totally secure environment, closely monitored and with restricted access control, making the service suitable for confidential and sensitive information, including patient records and HR files.

Using our purpose-built cataloguing application, we are able to capture and validate data with high levels of accuracy and consistency. We achieve inputting efficiencies through the capability to use secondary criteria where prime references fail the validation.

We provide both onsite and offsite cataloguing services, as well as general consultancy on taxonomy and records retention. At Box-it, it is our policy to 'get it right first time'.

Getting Started

An account manager and cataloguing team will be assigned to your project, and all the details are agreed before it commences.

We establish the file information you have already recorded, and use/create a unique identifier, such as client name, patient name/number, employee ID number.

If information is available, we simply require a report from your system containing the key data which we use for matching and validation purposes. This reduces the need to key additional data as we can 'pull' this from your data report when we match against the unique file reference.

It is not a problem if you do not hold any form of inventory, as our cataloguing application can be set up to capture each data item you need with behind the scenes validation.

The Process

Uniquely numbered barcode labels are applied to individual archive boxes and/or files within the box as required. The barcodes are scanned during cataloguing and also as a final reconciliation at the end of the process. This provides full traceability of box/file location as well as all movement.

The cataloguing process involves creating a template for data entry containing the agreed fields for the files. These are set as 'mandatory' or 'supplementary' depending on the user requirements.

We apply individual rules to each field to ensure formats are adhered to. We then run a pilot test and share the results with you before full implementation. The process involves scanning the barcode label, inputting the unique file identifier and validating this against the matching data 'pulled' from the key data matching report (see above) and displayed to the operator.

All the data is stored on a secure server at the point of cataloguing along with our own real-time management information on staff activity.

The data is finally quality checked and exported to the archive management system O'Neil Orders, Box-it's solution for online management of physical archives. As an option, we can also securely transmit a copy to you.

The Benefits you will Experience are:

- More efficient file and box retrieval
- More accurate document lifecycle management
- More timely destruction of aged archives for better compliance
- More security, through tighter controls on allowing better managed user access to archives
- More cost-savings, through disposal of documents that no longer need storing

Cataloguing paper files provides a robust platform for hybrid document management

"If only we could integrate paper and digital records management into the same system." If this statement resonates with you, then worry no more because Box-it has the ideal solution to bridge the gap between physical and digital document management.

Box-it's O'Neil Orders Cloud based system, provides a tried and tested hybrid platform for seamlessly managing both paper and digital records. Going forward, this ease of integration makes the business case for digitisation a feasible proposition for many organisations.

Cataloguing is an important feature of hybrid systems as it provides accurate information about physical archive content. Having this information available within O'Neil allows you to manage your paper archives online. The same O'Neil platform is used for your digital records, providing you with one user-friendly, secure system to manage both paper and digital documents from any location with internet access.
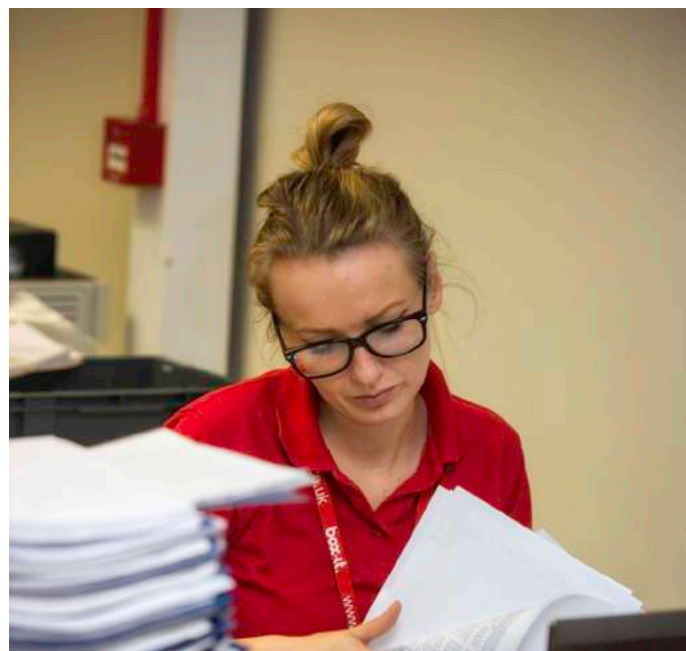
How it works

Authorised users can search for any documents or files within O'Neil Orders Search for one or multiple records. If the record has been digitised, it will be displayed directly on the screen. If it is a paper record and being held in one of our document storage centres, then the message advises this. You can instruct Box-it to pick and scan the paper file to the system which enables you to view the document on your screen (this is normally within 4 hours of your request), or you can request that we pick and deliver the physical file directly to your premises during the next working day.

From this point, O'Neil Orders automatically manages your records retention and destruction in accordance with your organisation's policies. O'Neil Orders allows you to review and authorise the destruction of qualifying files. If they are in paper format they can be securely destroyed via Box-it's confidential shredding services, or if they are digital, they are securely deleted.

By automating retention schedules, your organisation can:

- Dispose of records confidently
- Ensure the retention of a minimum number of records
- Satisfy audit requirements quickly and efficiently
- Produce information to Authorities on demand
- Save time, save space, save money
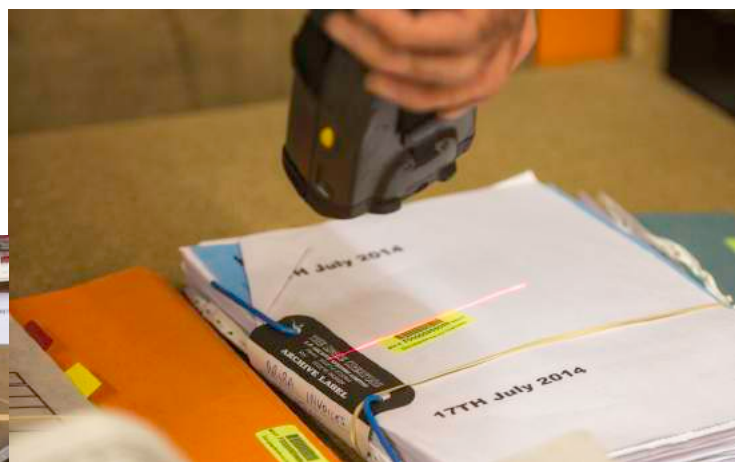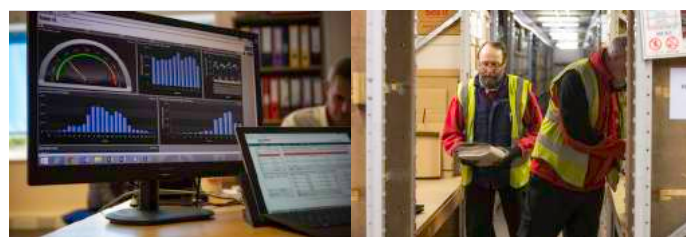
Local service

Our knowledgeable, friendly personnel at Box-it are on hand to help with those urgent and non-urgent requests, as well as any general enquiries you may have. We are proud of our reputation for excellent customer service. Wherever you are based, Box-it has the facility offering document management solutions within easy reach.

boxit-northscotland.co.uk

01224 909909

sales@boxit-northscotland.co.uk.

box-it ®

Storage / Scanning / Shredding / Out-Sourcing

Box-it North Scotland, The Data Centre, Edzell Base, Brechin, DD9 7XB. Call 01224 909909

IS61215