Large Documents: How One Company Got Better at Storing, Accessing & Sharing Them

EMERY INVESTMENTS

If your organization's operation depends on the information contained in large documents, you know the records management challenge they present. Their size means they can take up significant space and be difficult to house in standard storage systems. It also makes it difficult to share the information contained within the documents. And all this can add up to compromised retrieval times and access problems.

One organization facing those challenges was Emery, an industrial and commercial leasing company. They rely on thousands of large-size land development drawings, as well as structural, mechanical, engineering, and electrical renderings, to run their business.

"The high point was being able to send drawings electronically when the process was complete, and the TAB staff were very organized. They kept us up-to-date with weekly status reports, so the process overall was seamless."

Antonella Padula
Facilities Manager

1.0 The Need: Better storage and faster access

Emery's chief problem with their large documents was that without a proper storage system, the documents (as well as duplicates) had become dispersed over different locations within the organization. The collection also included records that were upward of 50 years old and in less then ideal condition. These factors made it hard to find and share large documents when they were required.

And since the information these documents contained needed to be sent to off-site project planners, potential new clients, and other internal and external stakeholders, quickly identifying and accessing the originals was critical to day-to-day operations. As a result, business growth was also heavily dependent on quick access and easy dissemination of the information contained in those documents. The time had come to find a better way to store, access and share these critical documents.

2.0 Choosing a partner

Emery had a standing relationship with TAB as a supplier. TAB's track record in designing custom, large-document solutions, as well as document conversions—including deep experience in the specialized and technical work of large-document imaging—convinced Emery that TAB services were right for this project.

3.0 Making it happen

TAB worked with the key stakeholders from Emery to get a full understanding of the problem as well as the desired outcome. During this process, the TAB team recognized the greatest benefit to Emery would come via a 4-pronged approach to their large-document collection:

— Imaging the collection
— Applying a functional classification system to all images
— Centralizing the collection on a shared drive
— Creating and installing custom storage for paper records that needed to be retained

Imaging Emery's collection of more than 2,000 drawings, including the delicate and damaged historical pieces, would require a collaborative, multi-step process, outlined here.

Emery's Large Document Conversion Process

Step 1: Purge non-essentials

Emery employees identified all original documents within their collection. Those files were moved to a larger area in the building, in custom shelving that would allow for expansion and storage efficiency.

Step 2: Data-base validation

Emery created a spreadsheet of those original documents. TAB then confirmed each record against the spreadsheet during the imaging process.

Step 3: Image the collection

TAB staff came on site and began the imaging process, which included preparing and scanning 4x3 drawings and other large documents.

Step 4: Establish a naming convention

Before imaging, drawings had been rolled up, stored in cubbies and identified only by site address. TAB applied records management best practices to create a more efficient system.

An enhanced naming convention identified electronic and physical records by cost center and type - such as electrical, mechanical or structural - making it easier and faster to identify and access a given record.

This new naming convention was used to create the functional classification system Emery needed.

Step 5: Create a shared drive

TAB moved all imaged files to a shared drive so Emery employees could access and share entire documents, or parts of them, depending on their particular need.

Previously, when documents were needed off-site, the entire roll of drawings had to be moved. Emery can now send relevant drawing components to any site without moving the originals.
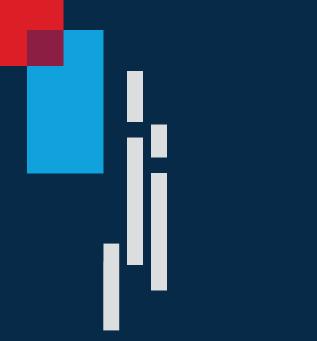
Each record was made CAD ready as well so employees could make notes and adjustments to documents as needed.

Step 6: Introduce custom storage

About 1,200 drawings were moved into customized, large-document shelving and each was given a TABQUIK label before being imaged. This freed up space for future growth and provided other benefits:

— Double levels of shelving installed to the ceiling maximized storage space.
— Individual end-tab folders meant that 8x11 records could be housed along side large documents in a single folder.
— Large-document folders could be laid out flat, rather than rolled up in cubbies, making for easier access.
— Delicate, original records were protected from damage by large-document folders.

"Every original drawing is stored, tagged and coded to our accounting system, so we can find it by address, as well as by cost center," says Facilities Manager Antonella Padula.

4.0 The Right Outcome

TAB's solution for Emery's large documents went beyond improved physical storage and included imaging their collection, applying a functional classification system, and creating a centralized shared drive.

The project was finished in 6 weeks and came in under budget. "The high point was being able to send drawings electronically when the process was complete," says Padula, "and the TAB staff were very organized. They kept us up-to-date with weekly status reports, so the process overall was seamless."

By introducing records management best practices, TAB helped Emery improve access to and retrieval times of thousands of large documents and also freed up space for future growth.

Talk to TAB

If your organization is considering a large-document imaging project, talk to us about how TAB can help manage and streamline the process.

UNITED STATES
888-822-9777

CANADA
800.387.6212
tab.com