



# DOCUMENT LIFECYCLE MANAGEMENT

## —From Creation to Destruction

The creation of a document begins a lifecycle of stages including active use, inactive use, archival or preservation, and destruction. By developing a strategic process for managing a document throughout its lifecycle, prior to its creation, you can generate efficiencies in your filing systems, positively influence business practices and reduce operational costs.

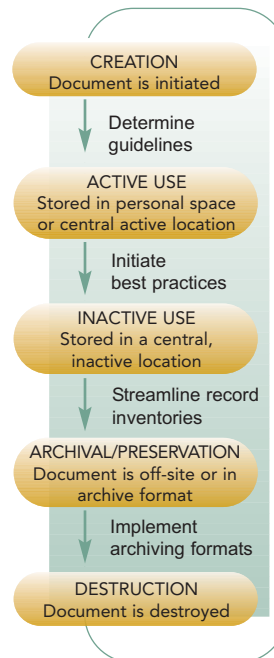
### Record creation

The first steps in implementing an efficient document lifecycle process starts at creation. Determining how the record is to be used, its importance, potential record redundancies, and the format of the record will affect storage, retention and preservation and will help establish clear guidelines for document management from the start.

### Active use

During active use, proper records management and consistency in practice can be extremely challenging. Individual work styles, space constraints, workflow, inconsistent or improper storage, and a lack of an established records management process can make it difficult to mandate best practices. For instance, small personal filing cabinets require top-tab file folders, while central filing areas may require end-tab file folders. Having a mixed format filing system is often not an ideal solution.

Early in the lifecycle process, it is wise to implement a systematic, strategic record management approach for the active use period that creates efficiencies in workflow and daily productivity.



**Improved practices throughout the document lifecycle.**

Understanding the document lifecycle process and implementing consistent practices creates operational efficiencies that impact your bottom line.



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# ANNOUNCING THE VERSATILE FILING SYSTEM FROM SYSTEC



Dual-label design provides identification on both the top- and end-tabs and can incorporate barcodes for file tracking.



The SYSTEC Group introduces the Versatile Filing System which is composed of the VersaFile, a unique top- and end-tab combination file folder, and the VersaLabel, a color-coded sheet label design and print system. Specifically created to accommodate filing and storage needs throughout the document lifecycle, this filing system manages your records from creation and active use in the workspace to central, shelf-based filing and finally, to archival storage. The system's innovative design fits any



File folder specifications: 11 and 14 point combination top- and end-tab letter-sized folder with reinforced end-tab - 12" x 9 1/2"



The multi-purpose top- and end-tab design saves time and material resources during the document management lifecycle.

industry application and is ideal for personal workstation filing, centralized filing systems and long-term storage. The Versatile Filing System allows flexibility in storage methods by supporting both top- and end-tab applications. Because the same file is used throughout a document's lifecycle, the benefits of color-coding, tracking and document management software can be realized from the start.

### VersaFile features

Created with absolute functionality in mind, the top tab of the VersaFile allows for drawer or desktop filing during active use, while the end tab is convenient for centralized shelf-based filing. When a file is archived in boxes and relocated to storage, the top tab once again becomes convenient reference. This multi-purpose design saves time and material resources during the document lifecycle as the need for file conversion is eliminated.

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### VersaLabel features

The VersaLabel is a labeling system designed specifically for the VersaFile and includes adhesive label stock of combination top- and end-tab labels. The specially-designed labels are compatible with a SYSTEC design and print software system, powered by ColorBar.® Color-coded labels can be created for alphabetic, numeric or custom-indexed filing systems and can be color matched to an existing design.

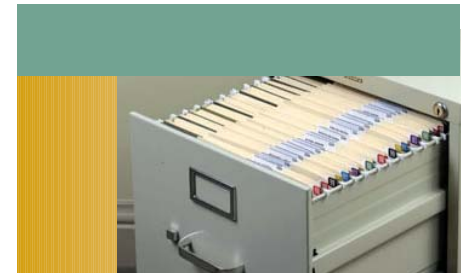
### VersaLabel is compatible with three types of print systems:

- *Print Only* – this stand-alone application automates label creation in any common format with unlimited designs, and integrates easily with other applications.
- *Network* – in addition to Print Only features, this version provides multiple users with network or concurrent seat licensing.
- *Print Design* – this stand-alone application provides full-featured label design and printing systems allowing users to create multiple-format, customized labels.

### Versatile benefits

The Versatile Filing System is designed to fit the way you work. From creation to destruction and everything in between, it streamlines processes and creates efficiencies throughout your company's records management system.

The Versatile Filing System is available now. For more information, contact SYSTEC. ■



### Top Tab

The top tab accommodates common storage solutions such as desktop file sorters, vertical or lateral file cabinets, mobile file carts and even archive storage boxes.



### End Tab

The end tab offers efficiencies in shelf-based filing applications including wall-mounted storage shelves, end-tab file cabinets and central shelving applications.

## SYSTEC SOLUTIONS

Effectively managing the lifecycle of your records requires incorporating the right tools and implementing the most efficient filing practices from start to finish. SYSTEC professionals will assess your specific document lifecycle process through a detailed evaluation that includes identifying and documenting how your records are created, how they move through your organization, who uses the records, how they are stored and more. We will recommend system improvements and product solutions, such as the Versatile Filing System, to streamline the lifecycle process and make it more efficient.

SYSTEC is your single source for records and information management. For more about how SYSTEC can help you, call 1-877-7SYSTEC or send an e-mail to [info@systemgroup.com](mailto:info@systemgroup.com). ■

# DOCUMENT LIFECYCLE MANAGEMENT *continued from pg. 1*

## Inactive storage

When a document becomes inactive, it is typically filed or boxed and stored in an accessible, central location separate from active files. At this stage, it is important to review the contents of your files and remove any duplicate or unnecessary documents to save space and increase efficiencies in document retrieval later. In addition, consider documenting your file inventory into a database to help manage and maintain a retention schedule. If you haven't already, implement bar-coding to increase control and effectively track inventories in a central or multiple locations.

## Archival or preservation

At the end of the retention period, historically significant records should be archived or preserved. This is done through a variety of methods including off-site or on-site paper preservation, electronic archival or the use of micrographic technologies, all of which are effective when used in a combination that suits a company's specific needs. Consider record inventory, storage space, technological specifications, business requirements and compliance regulations as you develop archiving procedures.

## Destruction

Once a record is determined to be historically insignificant, it is scheduled for destruction. At this stage, documents — paper, micrographic and electronic — can be audited and the necessary documents identified or gathered for destruction. A record should be destroyed in a method appropriate for its content. For instance, financial information should be destroyed in such a way that it is no longer recognizable in order to ensure privacy.

By implementing effective RIM processes and tools, such as file color-coding, tracking and storage applications, at the onset of a document's lifecycle, you can create efficiencies that will positively impact business operations as well as your bottom line.

## Benefits of planning ahead

As you determine processes for managing document lifecycles, consider efficiencies that maximize the reliability and functionality of your records and information management systems from record creation to destruction.

By implementing effective RIM processes and tools, such as file color-coding, tracking and storage applications, at the onset of a document's lifecycle, you can create efficiencies that will positively impact business operations as well as your bottom line. ■



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**Q:** How can I reduce the costs associated with document management and simplify our records archiving process?

**A:** Implement "best practices" at the onset of the document lifecycle process and you will create efficiencies to save money in labor and materials. To simplify archiving, as well as the entire document management process, consider using a filing system designed to accommodate the storage and tracking requirements for both active and inactive storage. This will eliminate the need to transfer files at a later date into top-tab folders when archiving; or barcode files or boxes prior to relocation; or create a retention inventory of archived records. If storing archive files off-site, complete a detailed record inventory and develop guidelines for accessing and re-filing records before relocation to reduce the risk of misplaced or incomplete information. Also, remember to consider your company's retention and destruction policies as you develop off-site storage procedures. ■