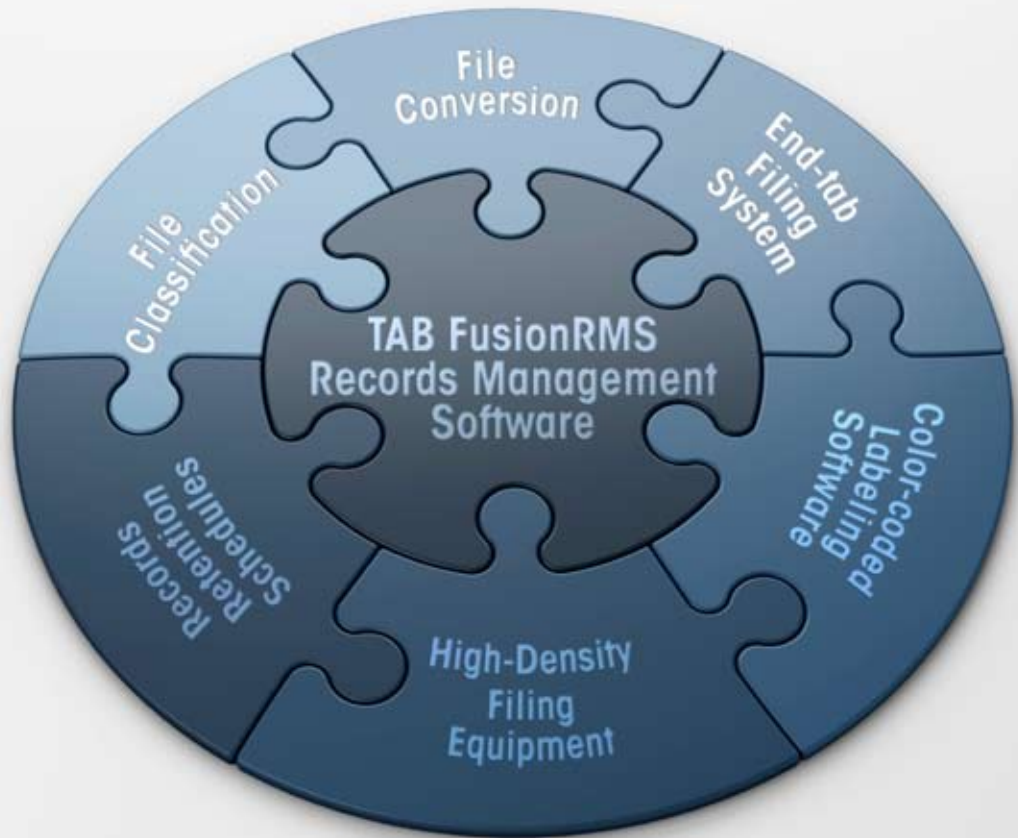


Imagine designing a filing system where anyone could find the files they needed, when they needed them.

What if you could update your filing system so anyone could find the files they needed, when they needed them? For the Louis Riel School Division (LRSD), it was the guiding principle behind the creation of their new records department.

Working with TAB over the course of two years, a solution evolved from humble beginnings to a system that would be a pleasure to use and the envy of any organization.



### 1.0 Starting from Scratch

Prior to this project, each department within the system looked after their own files, and when their storage space became too crowded, these files were boxed up and moved to inactive storage areas. So the records department started with 2000 boxes and 50 filing cabinets full of files from inactive storage.

Obviously, this was a less-than-ideal situation, with all the retention and access problems you might expect when bringing different collections together. Fortunately, databases (in Excel spreadsheets) were available for some of the collections, while others were created as the files were removed from the boxes.

This was the starting point that allowed TAB to begin to help LRSD reach their goal: the development of a holistic records management system that impacted records earlier in their lifecycle, creating a better user experience now and in the future.

### 2.0 A Solid Foundation: Classification and Retention

With TAB working closely with LRSD, the databases were used to create broad records categories and from there refine classification and retention systems that worked for existing business processes.

This in turn allowed the team to start getting the files out of the boxes and cabinets and apply the classification and retention schedules. The files were then placed onto the record department's shelves in a way that made sense for the way LRSD staff uses information. And with the retention schedule in place, LRSD could rest assured that they were only keeping what they needed, not storing unnecessary or outdated files.

### 3.0 Creating the Right Infrastructure

With the files out of the boxes and with the correct classification and retention schedules applied, the project then evolved into improving the physical infrastructure with the right supplies, equipment, software and services.

#### 3.1 Supplies and Equipment

To ensure the physical aspects of the project were in line with the larger goals, TAB and the LRSD created an environment that facilitated communication and information gathering. This meant crunching data, mapping workflows and understanding at a detailed level the desired outcomes. From there, TAB used the outputs to execute:

- space planning
- file system design
- equipment configuration
- file conversion

The result was to be an open end-tab filing system with multiple static shelving units and easily identifiable, custom color-coded files.

#### 3.2 File Conversion, Workflow and Software

At this point in the project, TAB's focus was on taking these fragmented records elements and associated manual processes and pulling it all together into a next-level records management system that worked for LRSD.

#### 3.3 Automating the Labeling Process

By designing custom labels and importing the existing databases into the TABQUIK labeling software, TAB made sure it was easy for LRSD to produce the labels for existing and day-forward files. This would be a critical part keeping on top of an ever-growing records center.

## TABQUIK®

Try our **TABQUIK** color-coded labeling software for free at [www.tabquik.com](http://www.tabquik.com)



**“From the very beginning, when we reached out to the records management community, we discovered that TAB spoke our language and they understood us. TAB made it easy for us to create the records department that we needed and wanted.”**

**—Shannon Henzel,  
LRSD Records Management Officer**



### **3.4 Pulling It All Together: TAB FusionRMS**

Once all the files were converted, properly labeled and color coded in the right shelving solutions, LRSD found over time that tracking them through multiple databases and in different formats was creating access inefficiencies.

The LRSD had already purchased an “out of the box” solution that wasn’t up to the task. This made TAB FusionRMS, with its customizable workflows and interfaces designed for the hybrid environment, a perfect fit for this next phase of the project.

TAB and LRSD once again worked together to ensure that FusionRMS was correctly customized for what they needed, designing the right workflows and database structures for LRSD’s business processes.

With this information carefully documented, TAB FusionRMS was then set up to manage all these databases in one simple interface, with the applicable classification and retention systems incorporated into the software for easy access, retrieval and tracking.

### **Results: A Better User Experience and a Stronger Role for Records Management**

Over time, TAB has helped LRSD to fully realize the vision of a complete records management system that was designed to ensure users could find the information they needed, when they needed it.

What made the project a success? As Shannon Henzel, Records Management Officer for LRSD puts it, “From the very beginning, when we reached out to the records management community, we discovered that TAB spoke our language and they understood us. Our main concern was accessibility so anyone could come in and find a record. TAB designed a filing system around this, to the point where people can find things just by quickly looking at the color-coding. TAB made it easy for us to create the records department that we needed and wanted.

Because of the holistic approach and improved usability of the records department, it continues to grow, offering more value to the organization and users, preserving and solidifying the important role of records management.



CONTACT ONE OF OUR REPRESENTATIVES TODAY.

UNITED STATES •	877.306.8875	<a href="http://www.tab.com">www.tab.com</a>
CANADA •	800.387.6212	<a href="http://www.tab.ca">www.tab.ca</a>
AUSTRALIA •	800.50.3453	<a href="http://www.datafile.com.au">www.datafile.com.au</a>
EUROPE •	+31 20 6975333	<a href="http://www.tab.nl">www.tab.nl</a>