



ELECTRA

Information Management Solutions

Preparing Documents for Offsite Storage®

At Electra we take pride in going out of way to provide the best customer service. This document provides information that will help our customers to ensure that box storage and service requests are provided with the highest quality and in a timely manner.

Preparing documents for offsite storage correctly is very important to ensure documents will be easy to find and manage. If documents are not prepared correctly future retrievals and other processes such as record disposal will be more costly and time consuming.

Electra provides document preparation services among many other information management solutions. This document provides a guide for preparing documents for storage with Electra. Please contact us should you need any additional information or help.

General Tips

1. Use good quality boxes specifically made for records storage. Not all boxes of the same size are manufactured equally. Pay attention to carton strength, lid height and box size when selecting a box.
2. Electra strongly recommends using the standard 1.2 cubic foot box (approximately 10"H x 12"L x 15"D) with a good lid. This box size handles both letter and legal size documents. Larger sized boxes can be used, but there are relatively more expensive than the standard 1.2 cf box and, because large boxes tend to be heavier, they deteriorate faster than standard boxes.

Box Identification

3. Identify each box on the on the front panel of each box as required. Depending on your record retention program and your numbering system, you might want to write the box number at a minimum. DO NOT use duplicate customer numbers. It may also be helpful to write information like the department, a general description and the planned destruction month and year. Do not put a lot of information on the outside of the box and always leave about 3" x 3" of space for the box barcode label from Electra.
4. An alternative for identifying boxes is to request from Electra pre-printed barcode labels. Information printed on label includes customer identification code, Electra's unique



warehouse number and the customer box number. The advantage of this system is that the customer is informed of Electra's unique warehouse number assigned to each box prior to moving the box offsite. With this previous knowledge of its unique warehouse number a customer requesting service can specify more accurately which box they need.

5. DO NOT affix any papers or documents, including the box document inventory, to the outside box or to the box lid. When boxes are handled and stored these papers may fall off or tear.

Inventory of Box Contents

6. Identify clearly all files, pockets, binders or envelopes to be stored.
7. Do not insert items in a box without a written description as this could lead to confusion when retrieving a specific file in the future. Do not store loose papers. Always use a proper folder or pocket to store documents. Binders typically waste more space in the box than regular file folders. Do not bundle documents with rubber bands, as they deteriorate over time.
8. Office personnel should prepare an itemized list of each record stored in each individual box. This list should also include other information you wish to provide such as department, date box was prepared, who prepared it and date of box destruction. Always follow your retention program schedule.
9. A copy of the document inventory list is to be placed inside of each individual box. The purpose of this list to help Electra personnel when searching for a file in its correct box. DO NOT affix the box document inventory to the outside box or to the box lid.
10. Make sure that all pre-authorized representatives have access to copies of these lists either in print or in a computer based format.
11. All records that follow a particular sequence (alphabetical or numeric) should be placed into boxes in their proper order.

Box Weight and Distribution

12. While inserting documents make sure box is neither too full nor heavy or with not enough items placed inside. Boxes that are too heavy are more susceptible to damage during regular handling. They are also harder to carry for your personnel as well as ours. Boxes that do not have enough items placed inside may also be affected during regular



handling; especially if the box quality is poor (the carton use is too weak). Empty boxes face the possibility of being damaged when stacked for storage.

Tips That Improve Service

13. Please do not repeat customer box numbers. When customers inadvertently repeat or duplicate box numbers the speed and cost of your service requests may unintentionally suffer. It is important to know exactly which boxes contain the information you need.
14. Make sure only pre-authorized personnel request services, pick-up or delivery. Failure to do so may result in our request for a written authorization and delays in completing your service order. Always keep the list of your pre-authorized personnel up to date.
15. In order to meet the highest standard for confidentiality Electra personnel does not take inventory of box contents upon its arrival at our facilities. If at any time you wish to have an inventory prepared of your boxes please ask one of our Sales Representative for further information and all available options.